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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

October 1989 Volume 18, Number 10

1990: A Strong Year for Travel But Industry Advised to Proceed With Caution

Buoyed by a third consecutive year of record-breaking totals in all major categories, the U.S. travel industry can look forward to continued growth in 1990. This was the commanding message conveyed to delegates at the US Travel Data Center's 1990 Travel Outlook Forum held earlier this month in Hollywood, Florida.

At the same time, speakers at the forum, cosponsored by the Travel and Tourism Research Association, cautioned that overall economic growth will be modest in 1990, and that long-term infrastructure needs, as well as environmental and other problems, will pose challenges to travel marketers in the future.

Keynote speaker, Dr. George Eads, vice president and chief economist for the General Motors Corporation, in a forecast generally echoed by other speakers and panelists at the day-long event, predicted modest, sustained growth for the U.S. economy in 1990, with no significant moderation in inflation, but some risk of recession.

The projections for a positive outlook followed a report by Dr. Suzanne Cook, director of the US Travel Data Center, that overall travel volume in the United States could increase by as much as 5 percent over 1988's record-breaking total to reach 1.3 billion person-trips. This will mark the fifth consecutive year of growth in U.S. resident travel. (A person-trip measures each person who travels 100 miles or more away from home).

According to the Data Center's monthly National Travel Survey, the number of nights spent away from home while traveling is growing at a slower rate than overall travel, up about 3 percent so far this year. In other words, Americans are continuing to take more frequent but shorter trips.

"We have realized that time available for travel, or for any of the numerous other activities in which we must or want to participate, is limited," said Cook. If the current rate of growth in nights continues, the Data Center predicts that total nights spent away from home while traveling to reach approximately 5.3 billion in 1989.

Other forum forecasts include:

- Donald Wynegar, director of the Office of Research, U.S. Travel and Tourism Administration (USTTA), indicated that international travel to the United States -- which is expected to reach an all time high of 36 million visitors in 1989 -- could increase by up to 7 percent in 1990. Wynegar cited a modest weakening of the U.S. dollar against other major world currencies as one of the reasons for the increase. Travel abroad by Americans may grow by as much as 4 percent over 1989's estimated volume of 43 million.
- Price-sensitive competition among major U.S. air carriers is expected to cut into profit margins, predicted Michael Derchin, vice president, Drexel Burnham Lambert, even though air passenger-miles flown will increase by over 3 percent and operating revenue for the airlines will rise by 4 percent in 1990.
- The hotel sector will raise room rates about 4 percent in 1990, according to Randy Smith, president, Smith Travel Research, while the occupancy rate might fall about one-half of a percentage point. Still, dollar sales should rise over 6 percent.
- The high cost of an airline ticket will dampen business travel, according to Bill Niles, director of research for the Reed Travel Group. He expects that business travel will show no growth in the months ahead as air fares rise more for business travelers and as corporations exert more control over travel costs.
- However, convention travel will continue to grow. Ed Hall, executive director of the Greater Birmingham Convention & Visitors Bureau, expects a 3.6 percent growth in convention attendance and a nearly 5 percent increase in expenditures. Regardless, higher air fares could be a key issue in the convention travel marketplace next year.
- The Cruise Lines International Association estimates that cruise lines will have served 3.5 million passengers by the end of this year, a 9.5 percent increase over 1988 passengers, reported Robert Dickinson of Carnival Cruise Lines. Over the next four years, North American capacity will increase (continued on page 3)

Falling Motor Fuel Prices Ease Cost of Travel in August

The overall cost of travel in the U.S. dropped 0.7 percent in August, a moderate decrease led by further declines in motor fuel prices, reports the Travel Price Index (TPI).

Travel Price Index and Components

August 1989 TPI Component	Monthly % Change July to August 1989	Annual % Change August 1988 to August 1989
Transportation	-2.0	7.2
Airline Fares	0.1	6.0
Other Intercity Trans.	0.1	3.9
Intracity Public Trans.	1.2	3.6
Motor Fuel	-3.6	8.2
Lodging	-1.5	5.1
Food and Beverages Away From Home	0.3	4.6
Entertainment	0.6	6.3
TRAVEL PRICE INDEX	-0.7	5.5
CONSUMER PRICE INDEX	0.2	4.7

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S., reached 129.0 (1982 - 84 = 100) during August. For comparison, the price of all goods and services purchased by Americans as measured by the Consumer Price Index (CPI) rose 0.2 percent to 124.6.

Motor fuel prices fell 3.6 percent in August for the third consecutive month, which spurred a 2.0 percent drop in the overall cost of transportation. Airline fares and other intercity transportation costs rose one-tenth of a percentage point, while the price of intracity public transportation increased 1.2 percent.

Lodging costs fell 1.5 percent in August, however, food and beverage prices rose 0.3 percent and the cost of entertainment increased 0.6 percent.

Since August 1988, the TPI has risen 5.5 percent, led by a 8.2 percent increase in motor fuel prices and a 8.3 percent jump in the cost of entertainment while traveling. The CPI climbed 4.7 percent for the same 12 month period. ♦♦

Domestic Vacation Travel Stablizes in July

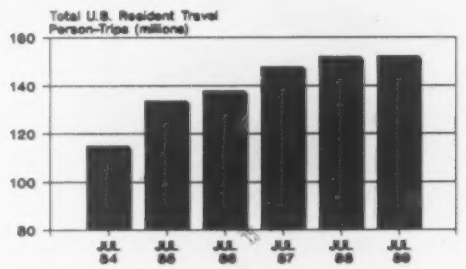
U.S. vacation travel stabilized during July 1989, following last July's 10 percent jump in vacationing, according to the Data Center's latest National Travel Survey (NTS) results.

Overall, travel volumes also leveled off as business travel rose and pleasure travel dropped slightly during July 1989.

The monthly telephone survey also showed that weekend travel, up substantially over year-earlier levels, contributed significantly to the 152 million person-trips taken by Americans in July. (A person-trip measures each person traveling 100 miles or more away from home.)

The July NTS also reports that:

- Travel by auto/truck/RV rose 3 percent, while air travel showed a moderate decrease;
- Use of hotels increased just over 2 percent;
- Average round-trip distance dropped from 960 miles last July to 830 miles in July 1989. ♦♦



TEIM Update

The project team directing the revision of the Data Center's Travel Economic Impact Model (TEIM) recently finalized the updated equations that will allow the model to produce more accurate estimates of United States travel expenditures, travel-generated employment, payroll, and taxes.

The TEIM technical review panel, a group of travel marketing and research professionals from all major segments of the travel industry, provided counsel and recommendations throughout the development of the revised equations.

Major modifications to the TEIM equations will specifically effect calculations of the economic impact of air travel, auto rentals, campground stays, meal purchases, and travel agency activity.

Using the new equations, the project team is now preparing a computer program that will generate revised estimates of the economic impact of U.S. travel for 1977 through 1987. ♦♦

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research, and an affiliate of the Travel Industry Association of America, Two Lafayette Center, 1133 21st Street, NW, Washington, D.C., 20036. Telephone:202/293-1040. Dr. Suzanne D. Cook, Director, Julie Bowers, Editor.

Travel Printout reports on Data Center projects, national travel research conducted by other respected organizations, trends in the U.S. travel industry. Subscriptions are $75 per year, U.S.; Canada and Mexico and other foreign countries, $80 per year, payable in U.S. funds only. ISSN: 0744-6233.

(continued from page 1)
between 8 percent and 10 percent as 36 new ships are added to the fleet.

♦ Amtrak expects rail passenger revenue to grow 12 percent in 1990, according to Colleen Bush, manager of market forecasting and analysis. Amtrak will continue to offer new services and continue to build on the successful programs in place. Also, the revenue-to-cost ratio will reach 75 percent next year.

♦ The demand for intercity bus transportation will continue to expand in 1990, but not at the 9 percent to 14 percent rates of growth of the past two years, reported Gary Graley, director of marketing research for Greyhound Lines, Inc. They project an increase in revenue passenger-miles of about 5 percent, bringing the total to nearly eight billion passenger-miles in 1990.

♦ Research conducted by the US Travel Data Center for Better Homes and Gardens shows that 78 percent of family vacations are scheduled less than three months in advance, said Peter Mason, travel classification manager for BH&G. Married adults have so far been somewhat unlikely to visit new places, since 76 percent of married adults reported that their most recent trip was a repeat visit.

♦ Ernest Acquaro, vice president of VMS Realty Partners, lists several major trends in leisure travel that will emerge in the next decade: a desire for absolute solitude, the necessity for a close-to-home escape, indulgence in shopping as a leisure activity, growing interest in the spa retreat, and a desire for varied experiences in an adventure vacation.

♦ This year's forum featured the outlook for various ethnic groups' propensity to travel. William McGugins of the Mingo Group, Inc., estimates that the growing black middle class presents a good opportunity for travel marketers. He estimates the size of the market to be nearly $30 billion and predicts that this market segment will turn in 10 percent more trips in 1990 than this year.

♦ The buying power for the U.S. Hispanic market is approaching $171 billion, with California and Texas accounting for 57 percent of the total U.S. Hispanic population, reported James Loretta of the Strategy Research Corporation in Miami.

♦ David Chen, executive vice president of Asian marketing for Muse Cordero Chen, Inc., estimates that Asian-American travelers will have taken 2.5 million trips by the end of 1989 and predicts that number to increase 10 percent in 1990. He says that cruises and European vacations are becoming popular with this market segment.

♦ Looking toward the 21st century, Michael Marien, editor of Future Survey, points to overcrowding and congestion as problems that will worsen. He listed several changes that will transform our world and the way we do business in the future: technology, a global economy, almost exponential population growth, and environmental destruction.

Next months' **Travel Printout** will feature additional highlights from the forum: David Meer, sr. vice president of the Daniel Yankelovich Group, revealed how the changing demographics of Americans will affect consumers' travel patterns; J. Kay Aldous, vice president of public and government services for the AAA, focused on current concerns with the infrastruce of the nations highways and skyways; and William Johnston, vice president for special projects at the Hudson Institute, discussed the changing workforce of the service industry approaching the year 2000.

The 1990 Outlook for Travel & Tourism will be available in December. To reserve your copy, send $125 to the US Travel Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. ♦♦

Visitor Volume at National Parks

Region	JUL 1989 visits	% Change from JUL 1988*	Year to Date % Change 1988/89*
NEW ENGLAND	2,791,778	6.7%	8.5%
MIDDLE ATLANTIC	4,569,865	-2.8	-0.9
SOUTH ATLANTIC	11,889,443	-4.0	-5.9
EAST SOUTH CENT.	2,697,300	-9.4	-3.6
EAST NORTH CENT.	1,310,388	0.7	-4.2
WEST NORTH CENT.	2,187,388	2.4	-0.9
WEST SOUTH CENT.	1,365,912	-2.7	0.6
MOUNTAIN	7,149,265	1.5	2.2
PACIFIC	7,479,837	1.2	-3.2
TOTAL	41,441,176	-1.2	-2.3

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States compromising the census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS...1989

	Month	Value	Units	Percent Change: Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Jul	$ 4,998	million	-4.9	5.9	8.7
Eating and Drinking Places(2)	Jul	$13,748	million	0.5	4.8	7.0
Gasoline Service Stations(2)	Jul	$ 9,339	million	-0.4	10.4	7.5
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Jul	62.8	percent	-1.3	0.0	1.4
Real Demand for Commerical Lodging(4)	Jul	64.9	million	-1.9	3.1	4.6
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Jul	29.7	billion	2.2	0.1	-1.5
Int'l Revenue Passenger-Miles	Jul	10.8	billion	8.1	5.8	9.8
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Jul	50.1	billion	8.3	3.2	4.4
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Jul	559.2	million	6.9	-5.2	4.7
Travel Price Index (1982 - 84 = 100) (8)	Jul	129.9		2.2	7.1	5.4
U.S. Resident Travel						
Total Person-trips(9)	Jul	152.4	million	17.2	0.3	4.9
Vacation Person-trips(9)	Jul	118.3	million	25.1	-0.3	6.7
Total Person-nights(10)	Jul	708.7	million	32.1	-12.1	-6.2
Vacation Person-nights(10)	Jul	611.6	million	48.6	-10.1	-3.5
Public Use of National Parks (11)						
Visits	Jul	41,441,176		25.4	-1.2	-2.3
Overnight Stays	Jul	3,348,656		29.9	-1.0	0.0
Foreign Arrivals to the U.S.						
From Overseas(12)	Jun	1,235,204		11.0	8.4	12.7
From Canada(13)	Jul	2,083,097		94.9	8.4	11.7
From Mexico(12)	Jun	93,221		4.2	12.4	27.1
U.S. Citizen Departures						
To Overseas(12)	Jun	N/A				
To Canada(13)	Jul	2,186,707		41.9	-10.8	-5.3
Domestic Demand for Gasoline						
Barrels/Day(14)	Jul	7,316	thousand	-6.2	-2.2	-0.3

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 1% arrivals only. (13) Statistics Canada (14) Preliminary; Source: U.S. Department of Energy.

US Travel Data Center
Two Lafayette Centre
1133 21st Street, NW
Washington, D.C.
20036
(202) 293-1040

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US Travel Data Center

November 1989 Volume 18, Number 11

Summer Travel Stabilizes after Tremendous Growth in 1988

Following last year's record-breaking levels for the same period, overall summer travel in the U.S. stabililzed in 1989. July, and August travel totalled 428 million person-trips virtually unchanged since 1988, according to the Data Center's National Travel Survey. (A person-trip is one person traveling 100 miles or more away from home.)

After a large increase of 9 percent in 1988, 1989 summer vacation travel leveled off at 321.5 million person-trips.

Business travel for these summer months was particularly strong with 68.6 million person-trips reported. However, pleasure travel declined moderately as Americans took an estimated 324.5 million pleasure person-trips.

"It is conceivable that pleasure travel was actually somewhat stronger, since business travel rose considerably and business and pleasure travel often overlap," suggested Elizabeth Stewart, manager of survey research at the Data Center.

Air travel also decreased this summer, but by a margin of less than one percent. One factor affecting this decrease was higher ticket prices which were up 9 percent year-to-date, according to William Jackman, assistant vice-president of public information at the Air Transport Association.

"Air travel has been growing at double digit rates year after year. It is the beneficiary of a robust economy, and this year the economy is not as strong. As a result, air travel, especially domestic, flattened out. Bookings are up for the holiday season; however, and air travel is beginning to look stronger."

In spite of a drop in pleasure person-trips, hotel-related travel increased by a solid 3.6 percent. In fact, the summer racked up over 194 million hotel person-trips.

Summer auto person-trips also stabilized from the previous year's substantial increase. Unchanged for 1988, this summer counted 340 million person-trips.

Jerry Cheske, public relations director for AAA, credits this leveling trend to several factors. One factor was an increase in the gas tax. Before Memorial day weekend, this accounted for an 18 cents higher gas price than during the same time in 1988. He also mentioned the slow growth of the economy, lower auto sales, and higher unemployment as affecting auto person-trips.

"There is no inherent weakness in the travel market. Last year was such a strong year that this leveling off does not indicate a bad year," warned Cheske.

Average duration of trips decreased a little to 4.4 nights away from home during the summer of 1989. Last year's average duration away was 4.8 days. The average round-trip distance was 871 miles; whereas, last summer it was 946 miles.

August travel was down nearly 5 percent compared to August 1988. Vacation declined by 4 percent; while weekend, auto, and pleasure travel experienced larger declines. The number of hotel-related trips, however, approximated last August's figures. Again, these decreases reflect a stabilizing of growth after a tremendous growth spurt in the industry last year.

The National Travel Survey summer reports, 1989 Summer Travel Market Close-up and Executive Briefing, will be available shortly. They are $90 and $65 respectively. For members, the copies are free and will be sent at no extra charge. For more information, contact Elizabeth Stewart at (202) 293-1040.

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Lower Lodging and Fuel Prices Drop Cost of Travel in September

The cost of travel in the U.S. fell 2.3 percent during September due to a significant decrease in lodging and motor fuel prices, reports the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S., reached 126.0 (1982 - 84 = 100) in September.

For comparison, the overall cost of goods and services purchased by Americans as measured by the Consumer Price Index (CPI) rose 0.3 percent to 125.0.

Travel Price Index and Components

September 1989 TPI Component	Monthly % Change August to September 1989	Annual % Change September 1988 to September 1989
Transportation	-1.3	6.3
Airline Fares	0.1	5.7
Other Intercity Trans.	-0.5	3.3
Intracity Public Trans.	0.0	3.6
Motor Fuel	-2.4	6.9
Lodging	-7.7	2.2
Food and Beverages Away From Home	0.6	4.7
Entertainment	0.8	9.4
TRAVEL PRICE INDEX	-2.3	4.5
CONSUMER PRICE INDEX	0.3	4.3

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

Leading the decline in travel costs for the month, lodging prices dipped 7.7 percent, while motor fuel costs fell 2.4 percent. This drop in gasoline prices spurred a 1.3 percent drop in overall transportation costs for the month. Airline fares rose just 0.1 percent.

The cost of food and beverages purchased while traveling rose 0.6 percent in September; entertainment prices increased 0.8 percent.

Over the past twelve-month period, the TPI climbed 4.5 percent, led by a 9.4 percent jump in entertainment costs and a 6.9 percent increase in motor fuel prices. The CPI rose 4.3 percent for the same period. ♦♦

Travel Review Conference to be Held

The fourth annual Travel Review Conference will be held on February 5, 1989, at the Hyatt Regency Hotel in Washington, D.C. Travel industry experts will review travel trends in 1989 so that the industry and marketers can better strategize for the coming years. The conference is a joint effort by the Data Center, the Travel and Tourism Research Association (TTRA), and the U.S. Travel and Tourism Administration (USTTA).

Dr. Suzanne Cook, executive director of the Data Center, will look at national and regional trends in U.S. domestic travel in 1989, and Don Wynegar, director of the Office of Research at the USTTA, will review 1989 international inbound and outbound travel.

Transportation trends for 1989, including air, auto, bus and rail travel, will be presented by Alan Pisarski, transportation policy consultant. Heidi Mathisen, marketing research manager for The Boeing Corporation, will discuss developments in airplane manufacturing during the past year. Marshall Murdaugh, President of the New York Convention and Visitor's Bureau will give the luncheon address.

Other travel segments to be covered at the Travel Review Conference include:

- U.S. and Canadian attractions
- Lodging
- Food service and restaurants
- Travel by disabled persons
- Cultural travel

Pre-conference registration fees for members of the Data Center, TTRA members and attendees of the USTTA International Tourism Conference are $155; others pay $175. Registration at the conference will be $195. Students pay just $95. Make checks payable to TTRA and send to:

Travel & Tourism Research Association
P.O. Box 58066
Salt Lake City, Utah 84158

For more information contact Vernon Azucenas of the Data Center at 202/293-1040. ♦♦

TEIM Update

Plans are underway to incorporate a forecasting component into the Data Center's Travel Economic Impact Model (TEIM), the only working model that provides estimates of the economic significance of travel spending in the U.S. This new element will help produce similar projections for up to five years into the future.

The addition of the new forecasting component is just one part of the entire $150,000 project to

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(continued from page 2)
update and revise the TEIM. The model was established in 1973 and has been updated on an annual basis since then.

Projected information about the effects of dollars spent on travel in the U.S., including employment, payroll and taxes generated, will help marketers at all levels to develop more effective marketing strategies.

For more information about the TEIM and its capabilities, contact Dr. William Fleming, manager of economic research, at 202/293-1040. ♦♦

1990 Travel Outlook Forum Highlights

J. Kay Aldous, vice president of public and government services for the AAA, spoke about the deterioration of the nation's transportation infrastructure at the 1990 Travel Outlook Forum held on October 3 in Hollywood, Florida.

"Our transportation infrastructure is crumbling," Aldous said, "60 percent of the nation's roads need resurfacing and 40 percent of bridges over 20 feet long are either structurally deficient or obsolete."

Also, he predicted that by the year 2000, 90 percent of the nation's interstate highways will need major work to remain useable.

To meet the nation's growing transportation needs over the next 20 years, highway spending by all levels of government would have to be doubled from the current level to nearly $100 billion a year.

According to Aldous, a new national transportation plan is due out in January. The plan is an effort of the Department of Transportation and coalitions of private and public sector organizations. He concluded that the plan "will require the support of everyone---the alternative is eventual total collapse of the transportation system and the entire economy."

♦ Also addressing the Travel Outlook Forum was William B. Johnston, director of the Workforce 2000 study at the Hudson Institute. Johnston discussed the changes in the service industry workforce as the year 2000 approaches.

He pointed to five demographic trends reshaping the workforce. These are the birth dearth, the middle aging of America, the feminization of work, the shift from the North to the South and West, and the changing complexion of new workers to include more minorities, immigrants, and women.

An increase in personal services as more double income families emerge and leisure time becomes more important will be a result of these changes. Another outcome will be a shift toward income-sensitive products and services.

The changing workforce will mean more competition for the best qualified workers, more investment in remedial training and education, and renewed concerns over equal opportunity.

♦ The Forum also featured David Meer, sr. vice-president of the Daniel Yankelovich Group. Meer related some of the demographic trends to travel consumption.

Referring to the U.S. consumer market as fragmented, Meer pointed out that the "whole concept of a broad consumer market or 'the average American' really doesn't hold much water anymore."

Market fragmentation comes from trends such as the erosion of the middle class, the aging of the population, non-uniform family structures, and the growth of cost cautious consumers.

Meer warns that the travel industry must move toward segmenting and targeting these markets: "This inevitably means choosing which segments to serve and which segments to let go."

He also foresees that information-hungry consumers will rely more on the services of travel agents. ♦♦

Visitor Volume at National Parks

Region	AUG 1989 visits	% Change from AUG 1988*	Year to Date % Change 1988/89*
NEW ENGLAND	2,858,405	9.2%	8.7%
MIDDLE ATLANTIC	4,316,213	10.7	1.4
SOUTH ATLANTIC	10,706,709	-4.9	-5.6
EAST SOUTH CENT.	2,467,317	-9.6	-4.6
EAST NORTH CENT.	1,122,989	-2.8	-3.9
WEST NORTH CENT.	2,042,373	4.8	4.0
WEST SOUTH CENT.	1,058,610	1.4	0.8
MOUNTAIN	7,158,988	6.1	3.2
PACIFIC	7,121,683	-3.9	-3.3
TOTAL	38,853,287	0.1	-1.6

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States compromising the census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. South Atlantic: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS...1989	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Aug	$ 5,219	million	4.4	7.5	8.6
Eating and Drinking Places(2)	Aug	$13,710	million	-0.2	3.3	6.5
Gasoline Service Stations(2)	Aug	$ 9,075	million	-2.7	4.8	7.2
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Aug	63.5	percent	1.1	1.4	1.4
Real Demand for Commercial Lodging(4)	Aug	67.5	million	4.0	4.2	4.5
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Aug	31.9	billion	7.7	2.1	-1.0
Int'l Revenue Passenger-Miles	Aug	11.3	billion	4.6	6.5	9.2
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Aug	50.0	billion	-0.3	4.6	4.4
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Aug	580.4	million	3.8	-1.3	3.8
Travel Price Index (1982 - 84 = 100) (8)	Aug	129.0		-0.7	5.5	5.4
U.S. Resident Travel						
Total Person-trips(9)	Aug	145.3	million	-4.7	-4.7	3.1
Vacation Person-trips(9)	Aug	108.6	million	-8.2	-3.8	4.6
Total Person-nights(10)	Aug	666.9	million	-5.9	-2.9*	-5.5*
Vacation Person-nights(10)	Aug	569.5	million	-6.9	-4.5*	-3.7*
Public Use of National Parks (11)						
Visits	Aug	38,853,287		-6.2	0.1	-1.6
Overnight Stays	Aug	3,308,918		-1.2	4.1	1.3
Foreign Arrivals to the U.S.						
From Overseas(12)	Jul	1,675,278		35.6	6.2	11.3
From Canada(13)	Aug	2,106,178		1.1	10.1	11.4
From Mexico(12)	Jul	159,222		70.8	5.2	21.2
U.S. Citizen Departures						
To Overseas(12)	Jul	N/A				
To Canada(13)	Aug	2,125,971		-2.8	-3.2	-4.8
Domestic Demand for Gasoline						
Barrels/Day(14)	Aug	7,585	thousand	3.7	0.4	-0.2

* The methodology for computing person-nights is being revised. As a result, 1989 data, beginning with the May survey, are not comparable with those of previous years. Adjustments in historical data will be made once changes in the methodology are completed.

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect I94 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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Two Lafayette Centre
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Research News for the U.S. Travel Industry

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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

December 1989 Volume 18, Number 12

Women Business Travelers: The Growing Market

In 1988, 13 million women traveled on business, representing 39 percent of all business travelers. Overall, women made 48 million business trips. However, this constitutes only 31 percent of the total business travel because women tend to travel less frequently than men, according to the Data Center's Survey of Business Travelers, conducted in conjunction with the National Travel Survey.

"The tremendous growth in the women's business travel market, from less than 1 percent of all business travelers in 1970 to well over one-third of total business travelers in the United States today, makes women a particularly attractive market for the travel industry," stressed Dr. Suzanne Cook, executive director of USTDC.

As of 1988, 31 percent of women business travelers were between the ages of 25-34 while 29 percent were 35-44 years old. These two age groups comprised the largest percentage of women travelers.

Women now represent well over one-third of all business travelers in the United States.

A larger number of women with family income of $20,000 to $29,900 and $30,000 to $39,900 traveled than in other income groups.

Over 50 percent of the women surveyed who took business trips in 1988 were college graduates. Of the respondents , 17 percent had post-graduate degrees.

Of the women business travelers, 26 percent held professional or managerial positions. Thirty-one percent were lower level technical or managerial staff. Another 20 percent possessed clerical and sales positions.

Among the demographic trends stimulating the continued growth in business traveler among women are: the middle aging of the population, the rising educational levels of women, and their growing income. These demographic trends positively correlate with travel.

The first trend, the aging of the population, refers to the growing numbers of 30 to 50 year-olds as the baby boom generation ages. Traditionally, these population segments show the highest incidence of travel, including business travel by women.

"The demographic trends suggest a very favorable prognosis for the continued growth of the female business travel market," explained Dr. Cook.

With this in mind, Cook suggests that there may be a few subtle ways for the travel industry to market their products to women. Three ideas to focus on include: the need to reach women through media that they prefer, recognizing women as legitimate travelers, and capitalizing on women's special and unique interests.

All of these ideas require sensitivity when marketing to women. This is especially important since women are an increasingly viable segment of the U.S.'s $95 billion business travel industry.

For more details about women business travelers, consult the **Survey of Business Travelers**. To order, call (202) 293-1040.♦♦

More about the NTS

The National Travel Survey is the only on-going survey devoted exclusively to the travel behavior of Americans. A monthly telephone survey of 1,500 U.S. adults provides the results. To avoid biases, the NTS uses a national probability sample.

Several Data Center members gain extra information about their industry segment by adding custom questions to the NTS and by ordering special tabulations of the extensive NTS data base. The product is individually tailored statistics. To name just a few members, the State Travel Offices of Tennessee and Louisiana as well as the AAA and Amtrak utilized this service.

For more information about the National Travel Survey, contact Elizabeth Stewart, manager of survey research at (202) 293-1040.♦♦

INSIDE: USTDC collects earthquake data for California . . . page 3.

The US Travel Data Center is an affiliate of the Travel Industry Association of America

Airline Fares Contribute to Higher TPI in October

The cost of travel in the U.S. rose 0.2 percent in October due to climbing airline fares and transportation costs, reports the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S., reached 126.3 (1982 - 84 = 100) in October.

For comparison, the overall cost of goods and services purchased by Americans as measured by the Consumer Price Index (CPI) rose 0.5 percent to 125.6.

Travel Price Index and Components

Travel Component	Monthly % Change September to October 1989	Annual % Change October 1988 to October 1989
Transportation	0.4	7.7
Airline Fares	0.8	6.2
Other Intercity Fares	1.1	2.6
Intracity Public Fares	0.0	3.3
Motor Fuel	0.7	8.9
Lodging	0.0	2.6
Food and Beverages		
Away From Home	0.2	4.7
Entertainment	0.2	4.7
Travel Price Index	0.2	4.9
Consumer Price Index	0.5	4.5

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

Airline fares led the travel cost increase with a 0.8 percent gain. The runner-up was transportation costs with a 0.4 percent increase. However, intracity public transportation showed no change while other intercity transportation costs recorded a 1.1 percent drop.

Lodging prices also remained the same in October. However, the cost of food and beverage while traveling and entertainment expenses both increased by 0.2 percent.

Since last October, the TPI climbed 4.9 percent, led by an 8.9 percent increase in motor fuel prices and followed by an 8.7 percent hike in entertainment costs. The CPI rose 4.5 percent for the same 12 month period.♦♦

Vacation and Weekend Travel Jumps in September

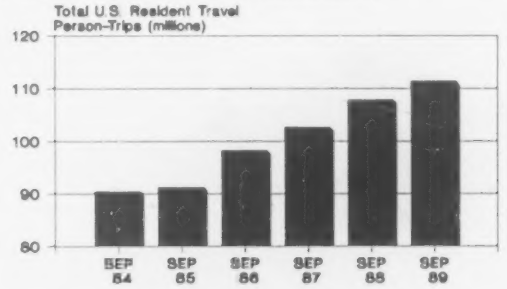
Americans traveled on vacations and weekends significantly more than last September, according to the Data Center's latest National Travel Survey (NTS) results.

Overall, the survey revealed more than a 3 percent increase in total travel volume. The number of total person-trips rose from 108 million in September 1988 to 111 million for the same period this year. (A person-trip measures each person traveling 100 miles or more away from home.)

Business continued its strong ascent with a 7 percent increase over last year. Pleasure and auto travel also gained over 1988.

The September NTS further revealed a 10 percent drop in hotel travel. Air travel decreased by a substantially smaller amount for the month as people took nearly 21 million person-trips.

Down from last September, the average trip length for this September was 3.7 days. The average distance traveled on trips in September 1989 was 910 miles. Last year, trips averaged 980 miles in distance. The trend suggests travelers continue to take more frequent trips but of shorter duration and distance.♦♦



TEIM Update

Undergoing a complete revision, the Data Center's Travel Economic Impact Model (TEIM) should be functional by April, according to Dr. William Fleming, manager of economic studies.

Developed in the mid-1970's, the TEIM is the only national model which produces comparable and consistent estimates of the economic impact of travel at the state and local levels.

"The underlying assumptions of the original model have become outdated. Recent changes in the travel industry such as the deregulation of the airlines and the HUB system precipitated a revision of the model. We are improving upon the accuracy of the estimates produced by the model," said Dr. Fleming.

Specifically, the complete revision/expansion process entails making the base model more comprehensive and the addition of three new

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Travel Printout reports on Data Center projects, national travel research conducted by other respected organizations, trends in the U.S. travel industry. Subscriptions are $75 per year, U.S.; Canada and Mexico and other foreign countries, $80 per year, payable in U.S. funds only. ISSN: 0744-6233.

(continued from 2)
components. These include: (1) Multiplier Component, (2) Foreign Visitor Impact Component, and (3) Forecasting Component.

The multiplier component measures the indirect impacts of travel-generated expenditures on the economy. The foreign visitor part estimates the economic impact of foreign travelers' spending. Finally, the forecasting component enables the Data Center to provide projections of travel spending and impact for up to five years into the future.

Recently, the project team finished the design of the base models of the TEIM as well as the computer software design.

Upon implementation in April, the TEIM will be a more effective and flexible tool for assessing the overwhelming economic influence that travel and tourism have on the national, state, and local economies.♦♦

Quake Data Collected

Responding quickly to the needs of the California Office of Tourism following the devastating October 17 San Francisco earthquake, the Data Center conducted a survey to discover whether the earthquake influenced people's interest in traveling to California in the next 12 months.

The survey consisted of four questions designed to estimate the frequency of non-business travel to northern California in the past five years; to measure the likelihood of non-business travel in the next 12 months; and to investigate the impact of the earthquake on the respondents' interest in traveling to California in the next year.

Almost 18 percent reported taking a non-business trip to northern California in the past five years. The survey also revealed that nearly 17 percent of those asked were likely, to some degree, to take a non-business trip to northern California in the next 12 months.

However, 18 percent answered that their interest in traveling to northern California in the next twelve months decreased to some extent after the earthquake. Also, 13 percent showed less interest in traveling to southern California due to the October 17 quake.

Nevertheless, about 77 percent of the respondents expressed no change in their interest in visiting northern California within the next 12 months as a result of the earthquake.

For more information, contact Margaret Amein, USTDC research analyst, at (202) 293-1040 ♦♦

Discoveries . . .

An ongoing guide to current travel research

♦ Tourism and the Travel Industry: An Information Sourcebook by Peter M. Engass provides almost 900 ways of finding information on domestic and international mass tourism.

♦ Dr. R. Bar-On's research handbook, Travel and Tourism Data, teaches his method of collecting and analyzing statistical materials on worldwide travel and tourism.

Note: These publications are available through: Oryx Press, 2214 North Central at Encanto, Phoenix, Arizona, 85004-1483; 1-800-457-ORYX.

♦ A new Oxtoby-Smith Survey, sponsored by Travel Agent Magazine, examines the travel agent's role in a traveler's vacation. The survey reveals that 94 percent of clients view agents as providers of an important service; 84 percent of the customers would use a travel agent again; and 86 percent felt that agents were knowledgeable. For more information, call David Zucker at (212) 887-1976.♦♦

Visitor Volume at National Parks

Region	SEP 1989 visits	% Change from SEP 1988*	Year to Date % Change 1988/89*
NEW ENGLAND	1,804,447	-3.0%	6.8%
MIDDLE ATLANTIC	2,995,812	14.9	2.9
SOUTH ATLANTIC	7,861,828	-8.8	-6.0
EAST SOUTH CENT.	1,954,833	-5.5	-4.6
EAST NORTH CENT.	605,924	5.7	-3.5
WEST NORTH CENT.	981,599	5.3	4.0
WEST SOUTH CENT.	839,872	8.0	1.4
MOUNTAIN	4,706,726	7.4	3.8
PACIFIC	5,222,099	0.8	-2.8
TOTAL	26,973,140	-0.1	-1.4

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States compromising the census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. South Atlantic: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS...1989

	Month	Value	Units	Percent Change: Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Sep	$ 4,956	million	-5.0	11.5	8.9
Eating and Drinking Places(2)	Sep	$13,990	million	1.8	4.6	6.2
Gasoline Service Stations(2)	Sep	$ 9,108	million	0.4	6.9	7.3
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Sep	65.3	percent	2.8	4.7	1.7
Real Demand for Commercial Lodging(4)	Sep	62.6	million	-7.3	6.9	4.8
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Sep	24.6	billion	-23.0	0.5	-0.8
Int'l Revenue Passenger-Miles	Sep	9.2	billion	-18.4	8.9	9.2
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Sep	43.7	billion	-11.7	3.9	4.3
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Sep	448.1	million	-22.8	5.6	4.0
Travel Price Index (1982 - 84 = 100) (8)	Sep	126.0		-2.3	4.5	5.3
U.S. Resident Travel						
Total Person-trips(9)	Sep	111.3	million	-23.4	3.3	3.1
Vacation Person-trips(9)	Sep	82.4	million	-24.1	19.4	6.2
Total Person-nights(10)	Sep	406.7	million	-39.0	N/A	N/A
Vacation Person-nights(10)	Sep	322.7	million	-43.3	N/A	N/A
Public Use of National Parks (11)						
Visits	Sep	26,973,140		-30.6	-0.1	-1.5
Overnight Stays	Sep	2,059,083		-37.9	14.6	2.9
Foreign Arrivals to the U.S.						
From Overseas(12)	Aug	1,550,697		-7.4	9.4	10.9
From Canada(13)	Sep	1,323,913		-37.1	12.8	11.5
From Mexico(12)	Aug	165,518		4.0	24.8	21.9
U.S. Citizen Departures						
To Overseas(12)	Jun	1,579,800		23.0	4.9	5.6
	Jul	1,608,600		1.8	-2.5	4.0
	Aug	N/A				
To Canada(13)	Sep	1,305,931		-38.6	-8.1	-5.2
Domestic Demand for Gasoline						
Barrels/Day(14)	Sep	7,175	thousand	-6.9	-3.1	-0.4

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect IPK arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

US Travel Data Center

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1133 21st Street, NW
Washington, D.C.
20036
(202) 293-1040

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December 1989
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Research News for the U.S. Travel Industry

INSIDE: WOMEN BUSINESS TRAVELERS

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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

January 1990 Volume 19, Number 1

States Budget Big Bucks for Tourism

The money all 50 states allocate to generating travel and tourism totals over $340 million for fiscal 1989-90. This represents a 6 percent jump from last year's actual sum, according to the US Travel Data Center's **1989-90 Survey of State Travel Offices**, the 17th annual report on the budgets, advertising, promotion and research programs of states' and territories' tourism agencies.

"The continued growth we see in the states' travel office budgets is a positive sign about travel's significance to the United States' economy, especially considering the fact that the travel industry is the third largest retailer in the nation and the second largest employer," commented Dr. Suzanne Cook, executive director of the Data Center.

Hawaii ranks number one for the first time this decade with a projected budget of $22.5 million. Up substantially, Hawaii's actual budget was $17 million last year.

Over the course of the decade, the growth in state travel office budgets was phenomenal. In 1980, the total of all state travel office budgets for the year was under $90 million. Now at over $340 million, this is almost a four-fold increase.

Furthermore, in 1980, New York spent the most money of all the states with $8.5 million; whereas, Hawaii's projected budget for 1989-90 increased to almost $23 million. In this way, the ever-increasing state travel office budgets reveal the importance of travel to the U.S. economy.

Another measure of states' efforts to garner part of the travel market is their advertising budgets. The sum of all 50 states' advertising budgets for fiscal year 1989-90 is $126 million. A comparison of past total advertising budgets reveals marked increases in these budgets over the course of the decade as states place more emphasis on promotion. For instance, the 1980 sum of all state's advertising budgets was only $29 million.

New York, Illinois, and Alaska intend to spend the most on advertising in fiscal year 1989-90. In fact, New York's projected budget is $12 million. The average advertising budget is $2.5 million, representing a significant increase over the 1980 actual average of $643,500 per state.

In addition to detailed budget breakdowns, the survey also provides information about state governments' and U.S. territories' programs including:

- General Administration
- Organization
- Advertising and Promotion
- Press and Public Relations
- Research
- Welcome Centers

Top Ten List

1.	*Hawaii*	*$22.5 million*
2.	*New York*	*22.1*
3.	*Illinois*	*22.0*
4.	*Texas*	*18.9*
5.	*Pennsylvania*	*15.9*
6.	*Michigan*	*14.1*
7.	*Alaska*	*11.4*
8.	*Tennessee*	*10.6*
9.	*Virginia*	*10.3*
10.	*Florida*	*9.5*

For more information about the **1989-90 Survey of State Travel Offices**, contact Kelly Repass at (202) 293-1040.

The Data Center will send copies of this report to its members. The survey is available to others for $75. To obtain a copy, send a check or money order to: US Travel Data Center, Two Lafayette Centre, 1133 21st Street NW, Washington, DC 20036.♦♦

INSIDE: Readers' survey...3,
Travel in the '80's...5.

Motor Fuel Prices Spur Lower November Travel Prices

The overall cost of travel in the U.S. dropped 0.3 percent in November. Lower motor fuel prices and lodging rates generated the decline, reports the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S., fell to 126.0 (1982 - 84 = 100) during November.

For comparison, the price of goods and services purchased by Americans as measured by the Consumer Price Index (CPI) rose 0.2 percent to 125.9.

Travel Price Index and Components

November 1989	Monthly % Change October to November 1989	Annual % Change November 1988 to November 1989
TPI Component		
Transportation	-0.7	+0.5
Airline Fares	1.1	6.2
Other Intercity Trans.	0.2	2.4
Intracity Public Trans.	0.7	2.3
Motor Fuel	-1.9	+7.0
Lodging	-1.0	+3.0
Food and Beverages		
Away From Home	0.3	4.7
Entertainment	0.0	9.6
TRAVEL PRICE INDEX	-0.3	5.4
CONSUMER PRICE INDEX	0.2	4.7

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Leading the decrease in travel costs for the month, motor fuel prices dropped 1.9 percent followed by a 1 percent fall in lodging prices.

Airline fares showed the sharpest increase for the month with a 1.1 percent change. Food and beverages costs also rose but by a lesser amount of only 0.3 percent.

Over the past 12 month period, the TPI climbed 5.4 percent, influenced by a 9.6 percent jump in entertainment costs and a 7 percent increase in motor fuel prices. Intracity public transportation costs grew the least with only a 2.3 percent climb. The CPI rose 4.7 percent for the same period.

October Business Travel Up

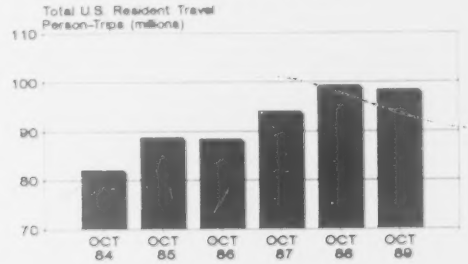
The number of business person-trips in October 1989 increased notably over last October with more than a 7 percent increase, according to the Data Center's latest National Travel Survey (NTS) results.

Total travel volume for the month dipped slightly by less than 1 percent from the same time last year. Americans took more than 98 million person-trips. (A person-trip measures each person traveling 100 miles or more away from home.)

Once again, vacation travel made a sizeable increase from the previous year with almost a 6 percent gain. Modest increases occurred in pleasure, auto, and hotel-related travel, while travel for other personal reasons declined.

Additionally, the October NTS reported drops in weekend and air travel. Weekend travel plunged almost 9 percent from last year. People took about 49 million weekend person-trips this year compared to 53 million in 1988. Air travel decreased by a much smaller amount of only 1 percent.

The average distance traveled in October 1988 was 940 miles, whereas, October 1989 recorded an average distance of 970 miles.



TEIM Update

Computer programming will begin on the Data Center's Travel Economic Impact Model (TEIM) towards the end of the month. The TEIM is the only working model that provides estimates of the economic significance of travel spending in the U.S.

Established in 1973, the TEIM is undergoing a complete revision to make the model a more effective and flexible tool for assessing the economic influence of travel and tourism at the national, state and local economies.

At this time, the Data Center is continuing to

(continued on page 4)

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(continued from page 2)
collect data for the model from private sources. Also, work on the forecasting model is progressing. The model generates data used in the **Impact of Travel on State Economies** report, as well as several other special studies conducted under contract.

For more information about the TEIM and its capabilities, contact Dr. William Fleming, manager of economic research, at (202) 293-1040.♦♦

Travel in the '80s at the Travel Review Conference

Dr. Suzanne Cook, executive director of the Data Center, plans to give a retrospective of the travel industry in the 1980's at the fourth annual Travel Review Conference on February 5, 1990, at the Hyatt Regency Hotel in Washington, D.C. The conference is sponsored by the Data Center, Travel and Tourism Research Association, and the U.S. Travel and Tourism Administration.

Travel in the 1980's got off to a slow start. In 1980, travel was substantially lower than in 1979, but by the end of the decade the travel industry made significant gains.

With this in mind, Cook will examine some historical events and major issues that influenced travel in the 1980's and demographic trends that affected the industry. Finally, Cook will present the outcomes of these factors in context of their affect on yesterday and today's travel market. Her presentation will pay particular attention to what happened in 1989.

Following the conference, the Data Center will make available for sale the slide presentation, script, and a special report. Note: Full members will be sent the report as part of their membership, and limited members will be eligible for a discount. For more information, contact Vernon Azucenas at (202) 293-1040.♦♦

News from the Data Center

During its December 4 meeting, the Data Center's Board of Trustees elected new members and officers for 1990. Dr. John D. Hunt, distinguished professor of tourism at the University of Massachusetts, will serve a second term as chairman in 1990.

Edward R. Book, replaces William D. Toohey, past-president of the Travel Industry Association of America (TIA), as vice-chairman. Book is now the president of TIA.

Officers remaining the same for 1990:

- Secretary, Dr. Charles R. Goeldner, director of the business research division, University of Colorado;
- Treasurer, David J. Humphreys, president of the Recreational Vehicle Industry Association;
- Executive Committee Member, Jerry Foster, president of Saga International Holidays.

♦ In other news, Lori Litzenberg moved over to the Data Center from the Travel Industry Association after a promotion. Her new position is as the marketing and membership assistant.

Also, Shawn Flaherty joined the staff as the media relations assistant following Julie Bower's promotion to assistant manager of marketing and membership. Working jointly for TIA and USTDC, Bob McClure now is the manager for marketing and membership at USTDC.♦♦

Visitor Volume at National Parks

Region	OCT 1989 visits	% Change from OCT 1988*	Year to Date % Change 1988/89*
NEW ENGLAND	1,533,740	-5.3%	5.9%
MIDDLE ATLANTIC	2,672,554	9.4	5.0
SOUTH ATLANTIC	7,201,035	-19.5	-15.8
EAST SOUTH CENT.	2,088,833	3.9	-3.6
EAST NORTH CENT.	533,580	17.1	-3.2
WEST NORTH CENT.	559,776	2.3	3.7
WEST SOUTH CENT.	803,157	6.0	1.6
MOUNTAIN	3,018,512	-3.8	2.7
PACIFIC	4,017,607	5.0	-1.7
TOTAL	22,428,794	-5.5	-4.4

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States compromising the census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic**: New Jersey, New York, Pennsylvania. South Atlantic: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central**: Alabama, Kentucky, Mississippi, Tennessee. **East North Central**: Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central**: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central**: Arkansas, Louisiana, Oklahoma, Texas. **Mountain**: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific**: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators - 1989

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Oct	$ 5,313	million	7.2	6.9	8.7
Eating and Drinking Places(2)	Oct	$13,792	million	-0.5	2.2	5.7
Gasoline Service Stations(2)	Oct	$ 9,032	million	-0.2	5.2	7.0
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Oct	64.4	percent	-1.4	2.7	1.8
Real Demand for Commercial Lodging(4)	Oct	66.5	million	6.2	4.5	4.8
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Oct	26.8	billion	8.9	1.0	-0.7
Int'l Revenue Passenger-Miles	Oct	8.4	billion	-8.9	5.1	8.8
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Oct	44.7	billion	2.3	4.6	4.3
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Oct	465.1	million	3.8	5.6	4.2
Travel Price Index (1982 - 84 = 100) (8)	Oct	126.3		0.2	4.9	5.2
U.S. Resident Travel						
Total Person-trips(9)	Oct	98.3	million	-11.7	-0.9	2.7
Vacation Person-trips(9)	Oct	67.0	million	-18.7	5.9	6.2
Total Person-nights(10)	Oct	429.0	million	5.5	17.0	-4.5
Vacation Person-nights(10)	Oct	336.0	million	4.1	28.2	-1.6
Public Use of National Parks (11)						
Visits	Oct	22,428,794		-16.9	-5.5	-1.8
Overnight Stays	Oct	1,227,984		-40.4	2.8	2.9
Foreign Arrivals to the U.S.						
From Overseas(12)	Sep	1,312,029		-15.4	13.3	11.2
From Canada(13)	Oct	1,220,488		-7.8	10.8	11.5
From Mexico(12)	Sep	91,748		-44.6	7.0	20.2
U.S. Citizen Departures						
To Overseas(12)	Jul	1,608,600		1.8	-2.5	4.0
	Aug	1,427,300		-11.3	-2.4	3.1
	Sep	N/A				
To Canada(13)	Oct	813,639		-37.7	-4.3	-5.2
Domestic Demand for Gasoline						
Barrels/Day(14)	Oct	7,214	thousand	-0.2	-0.8	-0.3

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary, revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary, unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 3% arrivals only. (13) Statistics Canada. (14) Preliminary. Source: U.S. Department of Energy.

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TRAVEL PRINTOUT

US Travel Data Center

February 1990 Volume 19, Number 2

Travel Takes Off in the '80s

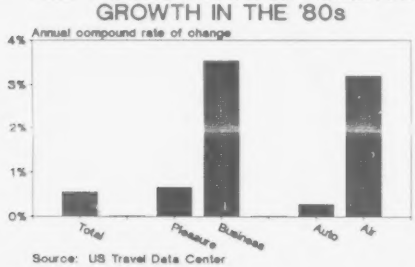
"Travel and tourism in the 80's became the vehicle for rather steady and dependable economic growth," explained Dr. Suzanne Cook, executive director of the Data Center, during her presentation at the fourth annual Travel Review Conference held in Washington, DC on February 5, 1990.

The presentation was a review of the 1989 domestic travel industry with a broader historical perspective of the industry during the whole decade.

"Learning from this decade's travel history, 1989 does not mark the end of an era but rather a gateway to the future."
-Dr. Suzanne Cook

The 1980s were a time of growth and significant change in both the supply and demand sides of travel. In the supply side over the decade, there was a 40 percent growth in hotel/motel rooms, air passengers increased 43 percent, cruise passengers more than doubled, and state travel office budgets nearly tripled.

ALL TRAVEL TYPES EXPERIENCE GROWTH IN THE '80s



Source: US Travel Data Center

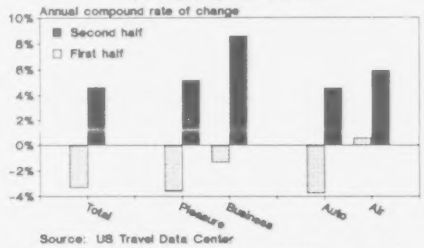
The aging of America, as the number of Americans between ages 25-34 and 35-44 bulged, created demand side changes. The shift in the age structure of the population prompted trends like "mini vacations" as time became an even more precious commodity. Also, increased marketing to the mature sectors resulted.

However, the decade exhibited a split personality because the growth was not linear. Instead, the growth concentrated in the second half of the decade.

At the start of the decade, a gloomy scenario greeted Ronald Reagan as he began his first term in office. Suffering from high rates of inflation, interest rates, and unemployment, the country was in a recession. Recovery came in late 1982, but the travel industry's recovery lagged behind the economy's recovery.

The nation's travel behavior was a victim of the weak economy in the pre-1985 period. For instance, after rising briefly in 1981, total travel volumes drifted downwards for the next few years. In 1980, the total number of person-trips was 1.1 billion; whereas, in 1984, total person-trips slid below that mark to 1.0 billion. (A person-trip measures each person traveling 100 miles or more away from home.)

BUT GROWTH CONCENTRATED IN SECOND HALF



Source: US Travel Data Center

Another loser for the pre-1985 period was pleasure person-trips. Interest in pleasure travel waned substantially as consumers often bought durables instead of traveling. The same pattern surfaced for business, weekend, auto, and vacation travel.

(continued on 4)

INSIDE: Comments from Dr. Cook...3, Industry Facts...4

Cost of Motor Fuel Drops December Travel Prices

For the fourth consecutive month, the overall cost of travel in the U.S. dropped. Travel prices fell 0.2 percent in December. Lower motor fuel prices and lodging rates generated the decline, reports the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S., fell to 125.8 (1982 - 84 = 100) during December.

For comparison, the price of goods and services purchased by Americans as measured by the Consumer Price Index (CPI) rose 0.2 percent to 126.1.

Travel Price Index and Components

December 1989 TPI Component	Monthly % Change November to December 1989	Annual % Change December 1988 to December 1989
Transportation	-0.7	6.1
Airline Fares	0.4	5.3
Other Intercity Trans.	0.7	1.7
Intracity Public Trans.	0.0	2.1
Motor Fuel	-1.6	6.8
Lodging	-0.7	5.4
Food and Beverages Away From Home	0.2	4.6
Entertainment	0.8	9.2
TRAVEL PRICE INDEX	-0.2	5.3
CONSUMER PRICE INDEX	0.2	4.6

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

Leading the decrease in travel costs for the month, motor fuel prices dropped 1.6 percent followed by a 0.7 percent fall in lodging prices.

Entertainment costs showed the sharpest rise for the month with a 0.8 percent change. Intercity transportation, not including airfares, also became more expensive but by a lesser amount of 0.7 percent.

Over the past 12 month period, the TPI climbed 5.3 percent, influenced by a 9.2 percent jump in entertainment costs and a 6.8 percent increase in motor fuel prices. Intracity public transportation costs grew the least with only a 2.1 percent climb. The CPI rose 4.6 percent for the same period.♦♦

November Weekend Travel Accelerates

The number of weekend person-trips in November 1989 gained momentum over last November as the month recorded 46 million person-trips or 9 percent more than same time last year, according to the Data Center's latest National Travel Survey (NTS) results.

Besides weekend travel, a large increase occurred in hotel/motel travel. The period registered almost 43 million person-trips, up from 39 million from November 1988.

Surprisingly, vacation travel made a sizeable decrease from the previous year with almost a 5 percent decline. Even more striking, auto person-trips plunged 6 percent.

Consequently, total travel volume for the month sank by 5.3 percent from the same time last year. Americans took fewer than 96 million person-trips, down from 101 million in 1988. (A person-trip measures each person traveling 100 miles or more away from home.)

The average distance traveled in November 1988 was 960 miles; whereas, November 1989 recorded an average distance of 900 miles. Furthermore, the average stay increased from 3.4 nights to 3.8 nights in 1989.♦♦

TEIM Update

Last February, Congress appropriated funds for revising and expanding the Data Center's Travel Economic Impact Model (TEIM), a statistical model that provides annual estimates of travel-generated spending and its impact on national, state, and local economies. One year later, the final model is almost at fruition.

The Data Center recently acquired the computer hardware to aid in producing a unified data base that makes the data more accessible and readily attainable than previously. Following revision, the model will be a more effective and flexible tool for assessing the impact travel has on the economy.

For more information about the TEIM and its capabilities, contact Dr. William Fleming, manager of economic research, at (202) 293-1040.♦♦

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Center, 1133 21 st Street, NW, Washington, D.C., 20036. Telephone; 202/293-1040. Dr. Suzanne D. Cook, Executive Director; Shawn Flaherty, Editor.

Travel Printout reports on Data Center projects, national travel research conducted by other respected organizations, trends in the U.S. travel industry. Subscriptions are $75 per year, U.S.; Canada and Mexico and other foreign countries, $80 per year, payable in U.S. funds only. ISSN: 0744-6233.

U S Travel
Data Center

DIRECTOR'S NOTES

commentary by
Suzanne D. Cook, Ph.D.

Following a successful Travel Review Conference on February 5, 1990, the U.S. travel industry realized not only the value of travel as a domestic commodity but its reach and value around the world as well. For my part, I reviewed the domestic travel climate for 1989 with respect to its being the capstone to a decade during which our industry endured and many prospered. In fact, travel became increasingly a link between families, friends, businesses, and nations. Success, as well as difficulties, marked this industry, and new trends emerged as a result. For this reason, I wanted to comment on some travel trends we observed and on ones that transformed the travel industry of the 1980s.

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1. Hotels. Following a boom in construction, the hotel sector introduced a number of new marketing and guest satisfaction programs including more and more refined segmentation, frequent guest programs, and amenities battles. Mega-resorts and all-suites were also developments during the 1980s.

2. Airlines. In the wake of deregulation, trends marking the airline industry often revolved around the rise, fall, merger, and consolidation of hundreds of airlines. Incentive programs became popular vehicles for attracting customers and building brand loyalty. Another result was the hub-and-spoke system which dramatically shifted route structures.

Furthermore, security concerns plaqued the airline sector as terrorism and aging aircrafts made consumers and the industry wary.

3. Surface Transportation. The gasoline shortage, the price crisis of the early 80s, and the deteriorating infrastructure, marred the surface transportation sector. Nevertheless, automobiles continued to dominate as the most used form of travel and even grew in popularity as the decade closed. Moreover, the rail component of this sector emerged much healthier at the end of the decade as Amtrak got back on its feet. Renewed growth was also the trend in the bus industry.

4. Destinations. Fierce and growing competition for traveler's business was a major trend in the destination realm. The significant growth in the number of CVBs throughout the country and the size of state travel office budgets verify this trend.

The decade also witnessed a rise in cultural attractions and events, the emergence of shopping centers and revitalized downtowns as tourist attractions, the strengthening of the theme park product, as well as new scenic byways and rural tourism initiatives.

5. Others. Significant industry-wide trends of the 1980s include the globalization of the industry as foreign investors bought several major U.S. travel companies and the more frequent operation of U.S. companies abroad. Additionally, specialization in product and service, the emphasis on quality and service, and greater focus on leisure travel characterized this decade.

6. Consumers. Consumer based trends also revealed the nature of the travel industry during the 1980s. We learned that travel is not recession proof as many consumers abandoned their travel plans when bad times hit. Also, the preciousness of time, especially among two-income families became more obvious as consumers began to deal with time constraints by taking more "mini-vacations" and weekend excursions.

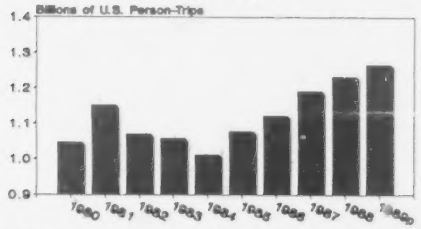
Finally, after experiencing a decade marked by materialism, we, as consumers and marketers, learned to value and emphasize the experiential nature of travel.

(continued from 1)

The post-1985 period revealed a vastly different personality. The period, bolstered by a strong economy, rose to meet the challlenge of a more demanding public.

All segments of the industry registered strong growth. Total travel posted gains every year. In fact, 1989 revealed a three percent rise over 1988 with a total of 1.3 billion person-trips.

RECORD 1.3 BILLION PERSON-TRIPS IN 1989



Another example of this growth was weekend travel. Making an ascent from 470 million person-trips in 1985, it flew to over 587 million by 1989. Vacation travel also moved ahead as it topped 883 million person-trips in 1989, up from 729 million in 1985.

A segment of increasing prominence in the travel industry is business travel. In the '80s, business travel growth outpaced all other types of travel. From 1980, business trips increased over 50 percent. After a slight stabilization in 1988, business travel renewed its growth, showing more than a 10 percent rise in 1989 with more than 236 million business person-trips.

AROUND THE INDUSTRY. . .

1. The January Consumer Confidence Index dropped 8 points from December, according to the Conference Board.

2. The Hospitality Valuation Services, Inc. created a new indexing tool that provides benchmarks for tracking hotel value differences between markets.

3. Up 50 percent from last January, this January airlines paid an average of $0.86 per gallon for jet fuel, according to Drexel Burnham Lambert.

4. Rockwell Schnabel, undersecretary at the USTTA, projected that foreign visitor spending could reach $89 billion by 2000.

Suggestive of travel's pervasiveness and importance to the U.S. are the ever-rising business receipts of the travel industry. For instance, the receipts doubled during the 1980s from a total of $172 billion in 1980 to $334 in 1989. In fact, even the 10 percent increase from 1988 to 1989 reflects travel's prominence.

The growing importance of time is a sign of the decade. An example of this trend is that people take more frequent trips but of shorter duration. For example, vacationers spent less time on trips in 1989 than in the previous year. The average duration slid, once again, down to an average of 4.7 nights. In 1985, the average stay was 5.7 nights per trip. These figures give credence to the idea that shorter, more frequent trips were an '80s trend.

"The Southeast region of the United States, with its tremendous variety and abundance of attractions, remained the most popular destination among Americans throughout the decade," commented Dr. Cook.

In 1989, the Southeast

Visitor Volume at National Parks

Region	NOV 1989 visits	% Change from NOV 1988*	Year to Date % Change 1988/89*
NEW ENGLAND	658,182	-6.5%	5.3%
MIDDLE ATLANTIC	1,688,444	6.9	5.1
SOUTH ATLANTIC	4,696,925	-13.8	-15.7
EAST SOUTH CENT.	1,585,835	6.3	-3.0
EAST NORTH CENT.	202,647	15.8	-2.7
WEST NORTH CENT.	339,958	1.5	3.5
WEST SOUTH CENT.	570,994	5.6	1.9
MOUNTAIN	1,824,557	3.8	2.8
PACIFIC	2,510,775	-6.6	-1.9
TOTAL	14,078,317	-4.4	-4.4

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

region once again dominated the scene, recording nearly 350 million person-trips or 30 percent of all domestic travel. Hence, as interesting and diverse as the two halves of the '80s seem, there were a few constants.

In the split-personality decade of the 1980's, 1989 proved to be a year of modest but sustained growth. The growth experienced in many sectors was not as strong as the previous four years; however, 1989 still fit the mold of the post-1985 personality.

"Learning from this decade's travel history, 1989 does not mark the end of an era but rather a gateway to the future," concluded Dr. Suzanne Cook about the state of the industry.

Dr. Cook's slide presentation, script, and a special report of this historical perspective of the decade of travel are available for purchase. Note: Full members will be sent the report as part of their membership, and limited members will be eligible for a discount. For more information, contact Julie Bowers at (202) 293-1040.♦♦

Other Conference Highlights

Other big news from the Travel Review Conference, co-sponsored by the Data Center, TTRA, and USTTA, came from the US Travel and Tourism Administration.

Don Wynegar, Director of Research at the USTTA, heralded the first ever U.S. tourism surplus. Translated, this means that the U.S. collected more money from foreign visitors than its citizens spent in foreign countries. In fact, 1989's surplus was $0.45 billion. Wynegar predicted a surplus of $1.48 billion for 1990.

Other notable speakers included Gilbert M. Grosvenor, president and chairman of the board of the National Geographic Society, Rockwell Schnabel, Under secretary of Commerce, and Marshall Murdaugh, President of the NYCVB.

The proceedings from the Fourth Annual Travel Review Conference will be available from the Travel and Tourism Research Association. For more information, contact Mary Lou Wood, executive director of TTRA, at (801)581-3351.♦♦

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Gasoline Service Stations(2)	Nov	$ 9,110	million	0.9	7.4	7.1
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Nov	65.3	percent	1.4	4.5	2.1
Real Demand for Commercial Lodging(4)	Nov	57.5	million	-13.6	6.3	4.9
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Nov	25.5	billion	-5.0	3.3	-0.3
Int'l Revenue Passenger-Miles	Nov	7.3	billion	-13.4	11.3	9.0
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Nov	41.6	billion	-7.0	4.4	4.3
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Nov	463.3	million	-0.4	5.5	4.3
Travel Price Index (1982 - 84 = 100) (8)	Nov	126.0		-0.2	5.4	5.3
U.S. Resident Travel						
Total Person-trips(9)	Nov	95.8	million	-2.5	-5.3	2.0
Vacation Person-trips(9)	Nov	66.1	million	-1.3	-4.8	5.2
Total Person-nights(10)	Nov	361.0	million	-15.9	N/A	N/A
Vacation Person-nights(10)	Nov	286.0	million	-14.9	N/A	N/A
Public Use of National Parks (11)						
Visits	Nov	14,078,317		-37.2	-4.4	-2.0
Overnight Stays	Nov	665,284		-45.8	5.4	3.0
Foreign Arrivals to the U.S.						
From Overseas(12)	Oct	1,140,700		-13.1	7.6	10.9
From Canada(13)	Nov	1,036,188		-15.1	16.4	11.8
From Mexico(12)	Oct	92,000		0.3	2.4	18.4
U.S. Citizen Departures						
To Overseas(12)	Sep	1,235,400		-13.4	-0.2	2.7
To Canada(13)	Nov	550,734		-32.3	-3.8	-5.1
Domestic Demand for Gasoline						
Barrels/Day(14)	Nov	7,356	thousand	1.4	-0.3	-0.3

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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SPECIAL REPORT: TRAVEL IN THE '80s

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Research News for the U.S. Travel Industry

TRAVEL PRINTOUT

US Travel Data Center

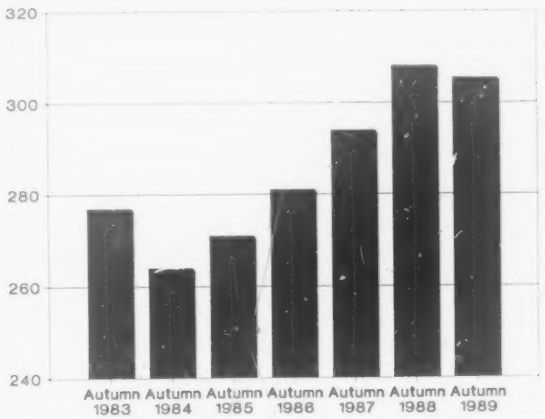
March 1990 Volume 19, Number 3

Autumn Travel Stabilizes

Total autumn travel volume in 1989 stabilized from the previous year. The months of September, October, and November recorded 305 million person-trips, according to the Data Center's **Autumn 1989 Travel Market Close-Up and Executive Briefing.** (A person-trip measures each person traveling 100 miles or more away from home.)

The flatness experienced by the 1989 autumn travel season followed five years of growth. In fact, since 1983, the increases in travel volume reflect a 10.3 percent jump. Even more significant was the massive expansion in the number of business person-trips. From 1983, the period recorded a 47 percent increase.

Total U.S. Resident Travel
Person-Trips (millions)



Despite the flat travel season, business travel was resilient again in 1989 as it grew more than 5 percent, accumulating 66 million person-trips. Another winner for the autumn was vacation travel, reporting close to a 7 percent gain over 1988. In fact, the number of person-trips bounced up to 216 million from 202 million in the previous year. Weekend travel also amassed a large number of person-trips as it increased 5.7 percent.

The Great Lakes region posted the largest increase in travel volume. From the fall of 1988, the area reported over a 7 percent hike in the number of person-trips to the region. Suffering losses, the West and Midwest regions' aggregate travel volumes declined 6 percent and 1 percent, respectively.

Compared to last year, economic conditions were weaker which may help explain travel's flatness in the fall. Specifically, payroll employment grew only three percent and disposable income was up just four percent as compared to autumn 1988. Personal outlays also showed a small increase over 1988.

Another possible factor for the stabilization in travel was the acceleration in travel prices. According to the Data Center's Travel Price Index, the overall cost of travel for the season rose almost 7 percent from the previous autumn. The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S., grew to 126.1 (1982 - 84 = 100) during these three months.

For sake of comparison, the Consumer Price Index (CPI), which measures the price of all goods and services purchased by Americans, rose 4.5 percent to 125.5 in autumn 1989.

For more information about the report and travel research services, call Elizabeth Stewart at (202) 293-1040. The autumn report, which is one in a set of four, costs $135 and all four seasons in 1989 costs $499. The 1989 full-year report will be released in June at the cost of $265. To order, send check or money order to: US Travel Data Center, Two Lafayette Centre, 1133 21st St NW, Washington, DC 20036. Members receive copies of all these reports in the mail.

INSIDE: Reader's Survey Results...3.

Motor Fuel Leads Travel Price Increases in January

After declining for two consecutive months, the overall cost of travel in the U.S. rose in January as travel prices rose 2.5 percent. Higher motor fuel prices and lodging rates generated the jump, reports the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S., grew to 129 (1982 - 84 = 100) during January.

For comparison, the price of all goods and services purchased by Americans as measured by the Consumer Price Index (CPI) increased 1 percent to 127.4.

Travel Price Index and Components

January 1990	Monthly % Change December 1989 to January 1990	Annual % Change January 1989 to January 1990
TPI Component		
Transportation	4.3	10.8
Airline Fares	1.3	5.6
Other Intercity Trans.	0.4	1.5
Intracity Public Trans.	3.9	6.2
Motor Fuel	6.5	14.8
Lodging	5.5	8.7
Food and Beverages		
Away From Home	0.4	4.5
Entertainment	0.6	7.9
TRAVEL PRICE INDEX	2.5	7.0
CONSUMER PRICE INDEX	1.0	5.2

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

Leading the increase in travel costs for the month, motor fuel prices advanced 6.5 percent followed by a 5.5 percent leap in lodging prices. Overall, transportation costs expanded for the month, posting a 4.3 percent change. Intracity public transportation also became more costly, but by a lesser amount of 3.9 percent. In fact, no measures reported declines for the month.

Over the past 12 month period, the TPI climbed 7.0 percent, influenced by a 14.8 percent jump in motor fuel costs and a 7.9 percent hike in entertainment prices. Intercity transportation costs, not including airfares, grew the least with only a 1.5 percent climb. The CPI rose 5.2 percent for the same period.♠♠

December Travel Sprints Ahead

The number of total person-trips in December 1989 sped past last December's total as the month recorded 109 million person-trips or 5 percent more than during the same time last year, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

The jump came from significant increases recorded in several segments including vacation, pleasure, and business travel. The period posted 78 million vacation person-trips, more than an 11 percent rise. In addition, pleasure travel grew 10 percent, registering 85 million person-trips. Meanwhile, business travel accounted for 18 million person-trips.

Besides these large gains, weekend and auto travel also showed growth. Weekend travel rose by 5 percent to 43 million person-trips. Posting a similar percent change, travel by auto increased to more than 80 million person-trips in December 1989.

The survey revealed that air travel grew only nominally with 23 million person-trips taken by this mode. Use of hotels shot up, but the average number of nights travelers spent in hotels decreased from the previous year.

The average distance traveled in December 1989 rose 10 percent from December 1988 to 962 miles. Furthermore, down from 5 nights in 1988, the average stay decreased to 4.6 nights in 1989.♠♠

TEIM Update

The Data Center will complete the forecasting component of the Travel Economic Impact Model (TEIM) by the end of next month, according to Dr. William Fleming, economic research manager for the Data Center.

The forecasting model enables the Data

(continued on 3)

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Center, 1133 21 st Street, NW, Washington, D.C., 20036. Telephone: 202/293-1040. Dr. Suzanne D. Cook, Executive Director, Shawn Flaherty, Editor.

Travel Printout reports on Data Center projects, national travel research conducted by other respected organizations, trends in the U.S. travel industry. Subscriptions are $75 per year, U.S., Canada and Mexico and other foreign countries, $80 per year, payable in U.S. funds only. ISSN: 0744-6233.

(continued from 2)
Center to make short-term and long-term predictions about travel volume and expenditures. The model has the capability to make projections about the economic impact of travel for the whole country, states, metropolitan areas, and even larger cities.

Undergoing expansion and improvement, the Data Center's Travel Economic Impact Model (TEIM) is a statistical model that provides annual estimates of travel-generated spending and its impact on national, state, and local economies. Following revision, the model will be a more effective and flexible tool for assessing the impact travel has on the economy.

For more information about the Travel Economic Impact Model and its capabilities, contact Dr. William Fleming, manager of economic research, at (202) 293-1040.♦♦

Travel Printout Gets Positive Feedback

In a recent reader survey (January 1990), the Data Center received both positive marks for its overall value and constructive advice for making it even better.

With a good response rate from all segments of readership, respondents judged the overall value of **Travel Printout** to be very good. Specifically, subscribers found the Travel Price Index, Current Travel Indicators, National Travel Survey, and articles from industry experts to be very useful. Also, readers' valued commentary from Data Center executive director, Dr. Suzanne Cook.

Suggestions for the **Travel Printout** included: more articles on future trends and economic indicators, other industry data, and an even greater use of graphs.♦♦

News from the Data Center

The Data Center had many new additions to its staff in March. The positions filled included: computer analyst, research assistant, and media relations assistant.

Starting in the computer analyst position, An Xiao joined the Data Center. She has a background in both computer programming and operations as well as data analysis. Most recently, she worked for AAA as a market associate.

Anne Clark also began this month as a research assistant in the survey department. Anne is a student at George Mason University majoring in Economics and will complete her degree in August. Previously, she worked as an operations analyst for the Planning Research Corporation.

Finally, Scott Dring started as media relations assistant following Shawn Flaherty's promotion to information services manager/editor at the Travel Industry Association of America. Prior to this position, Scott was the editor for the Immigration Reform Law Institute's newsletter. He is the new editor of Travel Printout. Scott has a degree from Ohio State University in public relations and journalism.♦♦

Visitor volume at national parks

Region	DEC 1989 visits	% Change from DEC 1988*	Year to Date % Change 1988/89*
NEW ENGLAND	253,395	-11.3%	5.0%
MIDDLE ATLANTIC	1,130,320	-5.0	4.6
SOUTH ATLANTIC	2,737,564	-28.5	-14.6
EAST SOUTH CENT.	1,275,067	-4.0	-3.1
EAST NORTH CENT.	150,235	-13.2	-1.8
WEST NORTH CENT.	166,487	-18.5	3.1
WEST SOUTH CENT.	339,678	-5.8	1.8
MOUNTAIN	1,275,069	13.8	3.5
PACIFIC	2,330,641	-1.7	-1.7
TOTAL	9,658,456	-11.1	-4.0

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States compromising the census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. South Atlantic: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators - 1989

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Dec	$ 3,645	million	-20.5	10.9	8.8
Eating and Drinking Places(2)	Dec	$13,717	million	-1.4	0.2	4.9
Gasoline Service Stations(2)	Dec	$ 9,538	million	4.7	12.8	7.5
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Dec	64.9	percent	-0.6	3.8	2.2
Real Demand for Commercial Lodging(4)	Dec	47.4	million	-17.6	7.2	5.0
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Dec	25.9	billion	1.7	3.7	0.0
Int'l Revenue Passenger-Miles	Dec	8.0	billion	10.7	13.6	9.3
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Dec	39.7	billion	-4.5	1.0	4.1
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Dec	490.6	million	5.9	0.9	4.0
Travel Price Index (1982 - 84 = 100) (8)	Dec	125.8		-0.2	5.4	5.3
U.S. Resident Travel						
Total Person-trips(9)	Dec	108.5	million	13.3	4.9	2.2
Vacation Person-trips(9)	Dec	78.1	million	18.2	11.3	5.7
Total Person-nights(10)	Dec	464.1	million	28.6	n/a	n/a
Vacation Person-nights(10)	Dec	389.9	million	36.3	n/a	n/a
Public Use of National Parks (11)						
Visits	Dec	9,658,456		-31.4	-11.1	-4.0
Overnight Stays	Dec	393,221		-40.9	16.0	3.2
Foreign Arrivals to the U.S.						
From Overseas(12)	Nov	963,431		-15.5	12.7	11.0
From Canada(13)	Dec	899,224		-13.2	11.6	11.8
From Mexico(12)	Nov	86,988		-5.5	13.0	17.9
U.S. Citizen Departures						
To Overseas(12)	Oct	N/A				
To Canada(13)	Dec	543,339		-1.3	-5.6	-5.1
Domestic Demand for Gasoline						
Barrels/Day(14)	Dec	7,300	thousands	-0.8	-0.6	-0.3

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted; 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service all carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 9% arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

US Travel Data Center

Two Lafayette Centre
1133 21st Street, NW
Washington, D.C.
20036
(202) 293-1040

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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

April 1990 Volume 19, Number 4

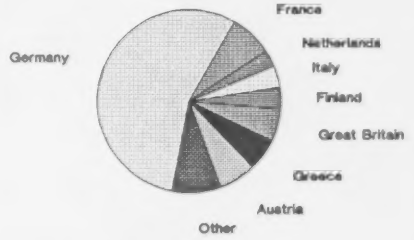
Agreement Links American, European Travel

Europeans made nearly 200 million trips abroad (outside their home countries) in 1989. For the first time USTDC has this type of European travel data available, serving as the exclusive marketing representative in North America for the European Travel Data Center.

"U.S. companies are forging closer ties with the European community with the new environment in Europe," said Dr. Suzanne Cook, executive director of USTDC. "It was important for us to expand services internationally in order to help meet the growing challenges of the 1990s and to better serve the U.S. travel industry."

The agreement provides that the U.S. Travel Data Center and the European Travel Data Center will be the exclusive representative on their respective continent of each other's products, primarily in depth research surveys. Both data centers are working towards standardizing U.S. and European travel research to help create a uniform world travel model.

TRIPS TO EASTERN EUROPE (1+ NIGHTS) BY COUNTRY OF ORIGIN



Source: European Travel Data Center, 1990

The European Travel Data Center is the foremost source of information regarding the European travel market. ETDC, based in Luxembourg, compiles information on the inbound and outbound travel markets of Western European countries.

Results cover travel by residents from 18 different countries: Austria, Belgium, Denmark, Finland, France, West Germany, Great Britain, Greece, Iceland, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Spain, Sweden, and Switzerland to 34 destination countries including the U.S. and Canada. In 1990 information will be collected from five Eastern European countries; East Germany, Poland, Hungary, Czechoslovakia and Yugoslavia.

ETDC produces the European Travel Monitor, which collects detailed information on both inbound and outbound travel markets. Nearly 35,000 Europeans are interviewed six times a year to determine their travel during the previous two months. A total of 200,000 are interviewed every year to provide highly reliable measures of travel volume, market share, characteristics and trends.

The European Travel Monitor is broken down into outbound and inbound reports. The outbound report measures the number of domestic trips of one night or more by residents of each of the 18 Western European countries, as well as trips outside their countries.

Trip data collected include; purpose of trip, mode of transportation, travel arrangements, season of trip, length of stay within each destination country, aggregate expenditures and a series of traveler demographics.

The inbound report is arranged on an individual country basis, covering all trips made by residents from the 18 Western European countries.

There are future plans to develop additional information, such as special reports containing more detailed information on Europeans' use, awareness and preferences of specific "brands" covering airlines, accommodations, credit cards and rental cars.

U.S. corporations will be able to purchase a complete outbound package and/or a complete series of inbound reports. An organization can also purchase inbound and outbound travel information on specific countries and/or market segment.

The agreement also offers the opportunity to customize research, add additional questions to develop proprietary information and purchase tapes containing the data base. In addition, corporations can receive a price reduction by combining with other corporations in their industry segment.

For additional information on the agreement between USTDC and the European Travel Data Center contact Bob McClure at (202) 293-1040.

Higher Lodging, Airline Fares Increase Cost of February Travel

The overall cost of travel in the U.S. rose 1.5 percent in February due largely to the increased rates of lodging and airline fares, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. grew to 130.9 (1982 - 84 = 100) during February.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) rose 0.5 percent to 128.0.

Travel Price Index and Components

February 1990 TPI Component	Monthly % Change January 1990 to February 1990	Annual % Change February 1989 to February 1990
Transportation	0.5	10.5
Airline Fares	2.5	7.6
Other Intercity Trans	0.1	1.8
Intracity Public Trans	1.1	6.7
Motor Fuel	-0.9	12.8
Lodging	4.4	10.0
Food and Beverages Away From Home	0.1	4.2
Entertainment	0.0	7.1
TRAVEL PRICE INDEX	1.5	7.2
CONSUMER PRICE INDEX	0.5	5.3

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Lodging rates showed the highest increase in February jumping 4.4 percent. Overall transportation costs rose only 0.5 percent. Airline fares showed the highest increase in transportation, rising 2.5 percent. The only decrease in February travel costs occurred in motor fuel, which dropped -0.9 percent. Food and beverages showed a slight rise at 0.1 percent, while entertainment costs showed no change in February.

Over the past 12 month period, the TPI rose 7.2 percent, influenced by a 10.0 percent jump in lodging and a 7.6 percent increase in airline fares. Even though motor fuel showed the only decrease in February it still showed the highest increase over the last 12 months at 12.8 percent.

January Travel Increases

There were 84.3 million total person-trips taken by U.S. residents in January, a 6 percent increase over January 1989, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

The largest increase occurred in business travel, which totaled 16 million person-trips, an increase of 28 percent over January 1989. Although business travel grew substantially, business trips were shorter, averaging 3.6 nights this year compared to 3.8 nights last year.

In addition, business trips also involved longer distances with the average round-trip distance jumping from 990 miles in January 1989 to 1190 miles in January 1990.

The overall growth in pleasure travel remained moderate with a 2 percent increase. Vacation person-trips, a sub-group of pleasure travel, jumped nearly 15 percent in January 1990, reflecting in part a small increase in the average travel party size.

The average duration of a trip increased to 4.4 nights in January 1990, compared to 4.1 nights in the previous year. Pleasure travel showed the largest increase, jumping from 4.4 nights to 4.7 nights.

Travel to the Northeast region increased dramatically, compared to January 1989 figures. The increase is probably related to the unusually warm weather experienced in January. The Southeast experienced moderate growth, and the Great Lakes region remained at 10.3 million person-trips, with no change from the previous January. Travel to the Midwest was off substantially but the West experienced a significant growth of visitors.

Air travel became a more popular choice for transportation in January, jumping nearly 6 percent in person-trips, while auto travel rose slightly to more than 2 percent.

The National Travel Survey is conducted monthly by telephone with national probability samples of 1,500 adults (age 18+) representing the total adult civilian, non-institutional population of the United States.

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Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

TEIM to be Released in July

The Data Center has announced that the Travel Economic Impact Model (TEIM) will be completed and released at a press conference on July 13 in Washington.

The Data Center is currently in the final stages of completing the forecasting component, according to Dr. William Fleming, economic research manager at the Data Center. The forecasting model has the capability to make projections about the economic impact of travel for the country, states and metropolitan areas.

Undergoing expansion and improvement, the Data Center's Travel Economic Impact Model (TEIM) is a statistical model that provides annual estimates of travel-generated spending and its impact on national, state and local economies.

Following revision, the model will be a more effective and flexible tool for assessing the impact travel has on the economy.

For more information about the Travel Economic Impact Model (TEIM) and its capabilities, contact Dr. William Fleming, manager of economic research, at (202) 293-1040.

Discoveries needed...

Do you have a travel research project that deserves a little recognition? **Travel Printout** is the place in the monthly "Discoveries" section.

"Discoveries" is a **Travel Printout** feature designed to give added exposure to all types of travel-related research.

To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to **Travel Printout**, U.S. Travel Data Center, 1133 21st Street, Washington, D.C., 20036.

Visitor Volume at National Parks

Region	JAN 1990 visits	% Change from JAN 1989	Year to Date % Change 1990/89*
NEW ENGLAND	282,073	-6.3%	-6.3%
MIDDLE ATLANTIC	1,001,902	20.4	20.4
SOUTH ATLANTIC	3,105,468	-24.7	-24.7
EAST SOUTH CENT.	1,332,694	6.5	6.5
EAST NORTH CENT.	188,124	-2.3	-2.3
WEST NORTH CENT.	176,006	-1.3	-1.3
WEST SOUTH CENT.	450,534	2.2	2.2
MOUNTAIN	1,255,119	7.5	7.5
PACIFIC	3,142,725	16.7	16.7
TOTAL	10,934,645	-2.2	-2.2

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: **New England:** Conn., Maine, Mass., N.H., R.I., Vermont. **Middle Atlantic:** N.J., N.Y., Penn. **S. Atlantic:** Del., District of Columbia, Fla., Ga., Md., N. C., S.C., Va., W. Va. **East South Central:** Ala., Ky., Miss., Tenn. **East North Central:** Ill., Ind., Mich., Ohio, Wis. **West North Central:** Iowa, Kan., Minn., Mo., Neb., N.D., S.D. **West South Central:** Ark., La., Okla., Texas. **Mountain:** Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. **Pacific:** Alaska, Calif., Hawaii, Ore., Wash.

News at the Data Center

The USTDC Membership Committee met on April 19 in Washington to discuss better ways of serving the Data Center's membership. Among the topics discussed were dues and membership benefit packages, according to staff liaison Lori Litzenberg.

Preliminary recommendations, along with redefined membership categories, discussed at the meeting leaned towards providing additional services and benefits to members.

The committee is in the process of compiling recommendations, which will be presented at the Board of Trustees Meeting on June 3 at Pow Wow in Orlando.

Members attending the meeting on April 19 were; Robert Liming, chairman; Robert Bryan, Peter Mason, Bob McClure, Jim Prosser, David Swierenga and Warren Wiethaupt.

AAA Joins Summer Forecast Press Conference

For the first time The American Automobile Association (AAA) will join USTDC for the annual Summer Vacation Travel Forecast press conference on May 22 in Washington.

The press conference will include the Data Center's annual summer forecast and AAA's Memorial Weekend projections. The joint press conference was created to provide a more concise and in depth summer forecast for the public and media.

This is the USTDC's ninth annual Summer Forecast. It annually releases projections on the number of summer vacation travelers, modes of transportation, accommodations, regional destinations, duration of travel and other summer forecasting material.

Current Travel Indicators - 1989-90

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Jan	$ 4,592	million	26.0	8.0	8.0
Eating and Drinking Places(2)	Jan	$14,005	million	2.1	1.7	1.7
Gasoline Service Stations(2)	Jan	$ 9,482	million	-0.6	11.9	11.9
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Jan	63.5	percent	-2.2	3.9	3.9
Real Demand for Commercial Lodging(4)	Jan	49.8	million	5.3	5.9	5.9
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Jan	24.5	billion	-5.2	1.9	1.9
Int'l Revenue Passenger-Miles	Jan	8.5	billion	5.2	18.2	18.2
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Jan	38.3	billion	-3.4	3.5	3.5
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Jan	428.0	million	-12.8	-3.5	-3.5
Travel Price Index (1982 - 84 = 100) (8)	Jan	129.0		2.5	7.0	7.0
U.S. Resident Travel						
Total Person-trips(9)	Jan	84.3	million	-22.3	6.0	6.0
Vacation Person-trips(9)	Jan	59.5	million	-23.8	14.6	14.6
Total Person-nights(10)	Jan	370.9	million	-20.1	n/a	n/a
Vacation Person-nights(10)	Jan	285.6	million	-26.8	n/a	n/a
Public Use of National Parks (11)						
Visits	Jan	10,934,645		13.2	-2.2	-2.2
Overnight Stays	Jan	381,683		-2.9	2.2	2.2
Foreign Arrivals to the U.S.						
From Overseas(12)	Dec	1,159,300		20.3	26.2	12.1
From Canada(13)	Jan	1,073,800		19.4	20.0	20.0
From Mexico(12)	Dec	131,200		50.8	15.3	17.6
U.S. Citizen Departures						
To Overseas(12)	Oct	1,120,600		-9.3	-6.3	1.8
To Canada(13)	Jan	407,573		-25.0	2.6	2.6
Domestic Demand for Gasoline						
Barrels/Day(14)	Jan	6,732	thousands	-7.8	0.0	0.0

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

US Travel Data Center

Two Lafayette Centre
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TRAVEL PRINTOUT

US Travel Data Center

May 1990 Volume 19, Number 5

Summer Travel to Reach Record High

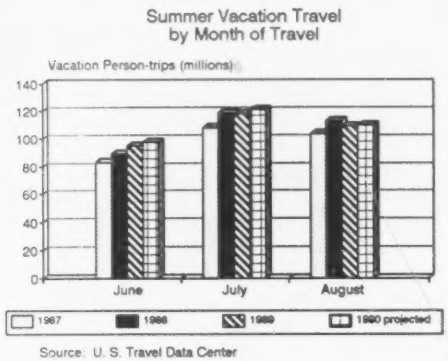
Americans will be traveling in record numbers this summer, predicted the Data Center at its annual Summer Vacation Travel Forecast press conference in Orlando, Florida.

"The record levels of vacation travel forecasted for this summer can be attributed in part to strong summer vacation intentions reported in the spring," said Dr. Suzanne Cook, executive director of the Data Center. "In addition vacation travel has increased in the first quarter of 1990 compared to last year."

For the first time, the press conference was held in conjunction with the American Automobile Association (AAA), who released their Memorial Day Weekend Outlook, at the soon-to-open Universal theme-park in Orlando.

According to the Summer Vacation Travel Forecast, more than 329 million vacation person-trips are forecasted, a 2 percent increase from last Summer. This represents nearly a 28 percent increase from the Summer of 1982, when vacation travel hit a recession-induced low of 259 million person-trips. The Data Center predicts that:

- There will be a 2 percent increase in Summer vacation travel in 1990, from 322 million in Summer 1989 to a projected 329 million in 1990.
- Vacation trips will rise nearly 4 percent over last summer to 148 million.
- An average travel party size of 2.2 people per trip, down from 2.3 in 1989.
- July will be the most popular month to travel this summer, reaching a record number of more than 121 million person-trips; 110 million will be taken in August and 98 million person-trips in June.
- The National Travel Survey revealed that 32 percent of consumers who traveled last summer have budgeted more for summer vacation this year, while 53 percent have budgeted the same.



Source: U. S. Travel Data Center

- More than 42 percent of summer vacation person-trips will involve stays at hotels/motels, a moderate increase from last year. Friends/relatives will host 39 percent of person-trips and camper/trailer/RV will attract 11 percent.
- There will be a continuing trend towards shorter trips. Last summer 47 percent of vacationers took trips lasting less than a week, compared to 50 percent in 1988.
- Corresponding with the increased popularity of short trips is the trend toward trips taken closer to home. This summer the largest share of vacations taken in the U.S., 56 percent, will be less than 500 miles round-trip.
- Day trips will account for 9 percent of all summer vacation travel, increasing to 28 million person-trips. Trips of one night will reach 36 million, 11 percent of all travel.
- Travel by car, truck and RV is expected to increase 2 percent, up to 270 million person-trips from 264 million in summer 1989. Air travel is expected to maintain the level reached last year, accounting for 15 percent of all vacation travel.
- Travel to visit friends and relatives will be the most popular purposes of travel this summer, accounting for 36 percent of all vacation travel.
- For the first time in three years, oceans and beaches topped the list of most likely destinations.
- Regionally, the Southeast will attract 33 percent of all vacation person-trips this summer, followed by the West with 22 percent, and the Midwest, which will host 15 percent.
- Departures to Europe are expected to increase 4 to 5 percent this summer and travel to other destinations outside the U.S. is also expected to grow or maintain last summer's levels, based on data from the U.S. Travel and Tourism Administration.

Higher Lodging, Airline Fares Increase Cost of March Travel

For the second consecutive month the overall cost of travel in the U.S. rose 1.5 percent due largely to the increased rates of lodging and airline fares, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. grew to 132.8 (1982 - 84 = 100) during March.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) rose 0.5 percent to 128.7.

Travel Price Index and Components

March 1990 TPI Component	Monthly % Change February 1990 to March 1990	Annual % Change March 1989 to March 1990
Transportation	0.3	9.7
Airline Fares	2.7	10.3
Other Intercity Trans.	0.3	2.6
Intracity Public Trans.	0.0	6.5
Motor Fuel	-1.4	9.6
Lodging	2.6	5.5
Food and Beverages away from home	1.1	4.9
Entertainment	0.6	7.1
TRAVEL PRICE INDEX	1.5	6.2
CONSUMER PRICE INDEX	0.5	5.2

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Airline fares showed the highest increase in March jumping 2.7 percent, even though overall transportation costs rose only 0.3 percent. Lodging also showed an increase, rising 2.6 percent. For the second straight month, the only decrease in travel costs occurred in motor fuel, which dropped 1.4 percent in March. Entertainment costs showed a slight rise at 0.6 percent, while food and beverages increased 1.1 percent.

Over the past 12 month period, the TPI rose 6.2 percent, influenced by a 10.3 percent jump in airline fares and a 5.5 percent increase in lodging. Even though motor fuel showed the only decrease for the second consecutive month it still showed an increase of 9.6 percent over the last 12 months.

February Travel Rises 6 Percent

There were 67.1 million person-trips taken by U.S. residents for the month of February, a six percent increase over February 1989, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

Automobile travel jumped nearly 7 percent with more than 52 million person-trips. Air travel declined slightly in February 1990, but those who traveled by air flew farther. The average round-trip distance for air travel rose to 2470 miles from 2250 miles in February 1989, according to the Air Transport Association.

The largest increase occurred in weekend travel, which totaled more than 40 million person-trips. Business travel jumped 12 percent over February 1989, and were longer in duration, averaging 3.4 nights this year compared to 2.8 nights last year.

Business trips also involved longer distances with the average round-trip distance jumping from 1120 miles in February 1989 to 1170 miles in February 1990.

Pleasure travel decreased about 1 percent this past February. Vacation person-trips, a sub-group of pleasure travel, also showed a slight decrease in February 1990.

The average duration of a trip increased to 3.8 nights in February 1990, compared to 3.4 nights in the previous year. Vacation travel showed the largest increase, jumping from 3.7 nights to 4.3 nights per trip.

Travel to the Great Lakes Region surged to 7.7 million person-trips in February 1990. Travel to the Southeast Region remained strong while travel to both the Northeast and West Regions grew moderately, posting year-to-date increases of 4 and 7 percent, respectively. The Midwest showed a decline in travelers in the first two months of 1990.

Hotel/motel person-trips rose nearly 8 percent from February 1989 to February 1990. The average duration in hotels/motels, however, dropped from 3.6 nights in February 1989 to 3.1 nights in February 1990, as more travelers are taking more frequent but shorter hotel/motel trips.

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Center, 1133 21st Street, NW, Washington, D.C., 20036. (202) 293-1040.

Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

TEIM Update

The Data Center will be completing the forecasting component of the Travel Economic Impact Model (TEIM) by the end of the month, according to Dr. William Fleming, manager of economic research.

The forecasting model enables the Data Center to make short-term and long-term predictions about travel volume and expenditures. The model has the capability to make projections about the economic impact of travel for the country, states and metropolitan areas.

Undergoing expansion and improvement, the Data Center's Travel Economic Impact Model (TEIM) is a statistical model that provides annual estimates of travel-generated spending and its impact on national, state and local economies.

Following revision, the model will be a more effective and flexible tool for assessing the impact travel has on the economy.

For more information about the Travel Economic Impact Model (TEIM) and its capabilities, contact Dr. William Fleming, manager of economic research, at (202) 293-1040.

Discoveries...

Travel Agent Magazine has completed its 1990 vacation travel study. The study entitled, "The 1990 Vacation Travel Study: The Vacation Decision Process from the Consumer's Point of View," is an independent study to explore the vacationer's decision-making process. The study will be released in a series of editorial pieces starting in the June 18, 1990 issue of Travel Agent Magazine. For further information contact David Zucker at (212) 887-1976.

"Discoveries" is a **Travel Printout** feature designed to give added exposure to all types of travel-related research. To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to **Travel Printout**, U.S. Travel Data Center, 1133 21st Street, Washington, D.C., 20036.

News from the Data Center

In order to better serve Data Center members and subscribers **Travel Printout** will begin, in the June issue, to publish the most up-to-date statistics available in the Travel Price Index (TPI), Current Travel Indicators (CTI) and the Visitor Volume at National Park's series.

As statistics have become available in a more timely matter, the Data Center saw the opportunity to provide the latest statistics to its membership.

The Data Center will begin to publish the latest statistics with the June issue of Travel Printout, which will include two sets of the TPI, CTI and Visitor Volume at National Parks. If you have any questions or comments contact Scott Dring at (202) 293-1040.

USTDC OPENS BOOKSTORE AT POW WOW

For the first time, the Data Center will be selling publications, memberships and other material at the Travel Industry Association's annual Pow Wow on June 2-6, 1990 in Orlando, Florida.

TIA's Pow Wow has become the most successful marketplace for selling Visit USA anywhere. More than 3,500 people attended the 1989 Pow Wow and sales reached more than $1.3 billion.

"It is a great opportunity to increase awareness of the Data Center on an international scope," said Bob McClure, director of Marketing and Membership.

For more information on the bookstore contact Julie Bowers at (202) 293-1040.

Visitor Volume at National Parks

Region	FEB 1990 visits	% Change from FEB 1989	Year to Date % Change 1990/89*
NEW ENGLAND	272,726	-3.5%	-10.8%
MIDDLE ATLANTIC	856,040	-7.9	-0.7
SOUTH ATLANTIC	3,339,357	27.6	0.0
EAST SOUTH CENT.	1,298,010	11.1	9.1
EAST NORTH CENT.	222,251	-17.3	-11.0
WEST NORTH CENT.	185,340	15.8	6.9
WEST SOUTH CENT.	535,186	25.9	14.1
MOUNTAIN	1,417,524	2.5	4.8
PACIFIC	2,597,964	0.5	8.8
TOTAL	10,724,398	9.2	4.0

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N. C., S.C., Va., W. Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

Current Travel Indicators - 1989-90

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Feb	$ 5,465	million	19.0	11.8	10.0
Eating and Drinking Places(2)	Feb	$14,196	million	1.4	3.8	2.7
Gasoline Service Stations(2)	Feb	$ 9,405	million	-0.8	8.9	10.4
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Feb	64.0	percent	0.8	3.7	3.8
Real Demand for Commercial Lodging(4)	Feb	61.0	million	22.5	7.4	4.6
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Feb	23.7	billion	-3.5	4.5	3.2
Int'l Revenue Passenger-Miles	Feb	7.1	billion	-16.5	21.0	19.5
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Feb	35.7	billion	-6.9	6.9	5.1
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Feb	409.9	million	-4.2	-0.2	-1.9
Travel Price Index (1982 - 84 = 100) (8)	Feb	130.9		1.5	7.2	7.1
U.S. Resident Travel						
Total Person-trips(9)	Feb	67.1	million	-20.4	6.0	6.0
Vacation Person-trips(9)	Feb	40.9	million	-31.3	-0.7	7.8
Total Person-nights(10)	Feb	255.0	million	-31.3	n/a	n/a
Vacation Person-nights(10)	Feb	176.0	million	-38.4	n/a	n/a
Public Use of National Parks (11)						
Visits	Feb	10,724,398		-1.9	9.2	3.1
Overnight Stays	Feb	460,132		20.6	11.5	7.1
Foreign Arrivals to the U.S.						
From Overseas(12)	Jan	1,008,200		-13.0	14.6	14.6
From Canada(13)	Feb	937,600		-12.7	14.0	17.1
From Mexico(12)	Jan	80,468		-38.7	-0.6	-0.6
U.S. Citizen Departures						
To Overseas(12)	Nov	1,037,700		-7.4	0.5	1.6
To Canada(13)	Feb	452,048		10.9	1.3	1.9
Domestic Demand for Gasoline						
Barrels/Day(14)	Feb	6,799	thousands	1.0	-4.2	-2.1

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

US Travel Data Center
Two Lafayette Centre
1133 21st Street, NW
Washington, D.C.
20036
(202) 293-1040

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TRAVEL PRINTOUT

US Travel Data Center

June 1990 Volume 19, Number 6

Weekend Travel: America's Growing Trend

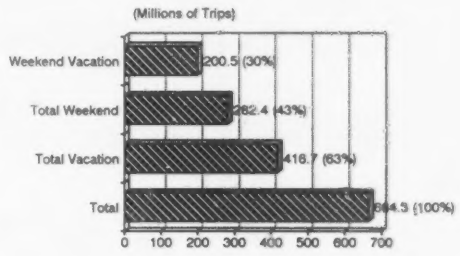
In the late 1980s, there has been a growing trend towards shorter trips and more weekend travel. More than 55 percent of all vacation trips taken in 1989 lasted three nights or less and nearly half were taken over a weekend, according to the Data Center's *Weekend Travel: America's Growing Trend.*

Over the past six years there has been a distinct upward trend in the number of weekend vacation trips. From 1984 to 1989, weekend vacations climbed 28 percent, increasing in value and importance to the total travel market.

Weekend travel is defined as trips lasting one to five nights, including a stay over a Saturday night, while weekend vacation travel is defined as weekend trips which were also considered to be a vacation trip by the respondent.

Some industry analysts have suggested that the trend towards shorter vacation trips is at the expense of longer trips. The Data Center's National Travel Survey shows that vacation trips of 10 nights or more have fluctuated only slightly since 1980.

Size of the Weekend Vacation Market
1989



Source: U.S. Travel Data Center's National Travel Survey

While the volume of longer trips does not show any dramatic change over time, daytrips and trips of two to three nights have displayed growth in recent years. Data indicate that the increase in daytrips and short trips are accounting for the moderate growth in vacation travel seen in recent years.

Young people and married couples with no children are the demographic groups taking the most leisure weekend trips. More than 68 percent of all weekend leisure trips were taken by Americans under the age of 45 in 1987. More than one-half (55 percent) were taken by married couples and 29 percent by married couples without children.

Late baby boomers (25-34 years old) comprised 23 percent of all households, yet they took 30 percent of all leisure weekend trips in 1987.

Why has weekend travel become such a growing trend in recent years? Some of the reasons may include the limited availability of leisure time, stress, the growing number of dual-career couples, the decline in households with children and other social and demographic factors that have affected the travel industry.

Industry experts have suggested that with more women in the workforce, many couples face a time crunch and scheduling conflicts, which make it difficult to take the traditional two-week vacation.

From 1980 to 1986, the number of married women who were employed increased 13 percent and the number of women working full-time increased 16 percent. These trends suggest that scheduling conflicts over vacation time may occur more often now than in the past.

Other statistics from the report include:

- Summer and fall were the most popular seasons for weekend travel in 1989.
- "Getting away from it all" was the most frequently cited reason for taking weekend trips.
- In 1989, 44 percent of weekend vacation trips involved a stay at a hotel, while nearly half involved a stay at friends and relatives' homes.
- Well over half of all 1989 weekend vacation trips consisted of round-trip distances of less than 500 miles.
- The South Atlantic census region stood out as the most popular destination for weekend vacation trips in 1989. Exactly one-half of all weekend vacation trips were taken to a single destination while 40 percent involved two overnight destinations.
- Most weekend vacation trips were taken without other members of the traveler's household or with just one other household member.

The Weekend Travel Report can be purchased for $35. *(Data Center members will be receiving a complimentary copy.)* For more information contact Julie Bowers at (202) 293-1040.

Higher Transportation Fares Increase Cost of April Travel

Increases in transportation and entertainment prices contributed significantly to the rise in the overall cost of travel in the United States in April. According to the Data Center's latest Travel Price Index (TPI), the cost of travel rose 0.2 percent in April over the prior month.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S., grew to 133.1 (1982 - 84 = 100) during April.

For comparison, the overall cost of all goods and services Americans purchase, as measured by the Consumer Price Index (CPI), rose 0.2 percent to 128.9.

Travel Price Index and Components

April 1990 TPI Component	Monthly % Change March 1990 to April 1990	Annual % Change April 1989 to April 1990
Transportation	1.7	4.2
Airline Fares	1.3	11.5
Other Intercity Trans.	0.6	3.1
Intracity Public Trans.	0.0	6.4
Motor Fuel	2.1	-1.0
Lodging	-1.5	7.3
Food and Beverages away from home	0.5	5.0
Entertainment	1.3	7.8
TRAVEL PRICE INDEX	0.2	5.9
CONSUMER PRICE INDEX	0.2	4.7

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Overall transportation costs rose 1.7 percent in April and motor fuel, a component of transportation, showed the highest increase in April jumping 2.1 percent. Airline fares and intercity transportation also showed slight increases, while intracity public transportation costs were unchanged.

Entertainment also showed a sizeable increase, rising 1.3 percent in April. Food and beverages away from home posted a 0.5 increase in cost in April. The only decrease in travel costs occurred in lodging, which dropped 1.5 percent.

Over the past 12 month period, the TPI rose 5.9 percent, influenced by a 11.5 percent jump in airline fares and a 7.3 percent increase in lodging. Motor fuel, however, dropped 1 percent over the last 12 months.

March Travel Increases 5 Percent

Despite a 6.2 percent annual increase in travel costs in March 1990, total travel grew nearly five percent during the month with more than 87 million person-trips recorded according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

Much of the growth can be attributed to a strong business travel segment, more than 17 million person-trips for the month. Pleasure travel, however, remained most popular, accounting for 67 million person-trips. Vacation travel volume dipped slightly to 52.4 million person-trips from 52.9 in March 1989.

Air person-trips dropped more than 1 percent, while automobile travel rose more than 2 percent. The average round-trip distance for air travel rose to 2420 miles, up from 2000 miles in March 1989, consistent with the increase in air passenger-miles reported by the Air Transport Association.

The average duration of a trip in March increased slightly to 3.7 nights, up from 3.5 nights in March 1989. Air travel showed the greatest increase in duration jumping from 5 nights last March to 5.7 nights this year.

Overall round-trip distances increased from 880 round-trip miles in March 1989 to 950 round-trip miles this March. Vacation travel was slightly longer, averaging 1100 round-trip miles in March.

Travel to the Northeast Region surged to 16.9 million person-trips in March 1990. Travel to the Great Lakes and Southeast Regions remained strong, as well. The Midwest showed a decline in travelers for the first three months of 1990.

Hotel/motel accommodations were used during 42 million person-trips in March. The average duration in hotels/motels, however, dropped from 3.9 nights in March 1989 to 3.7 nights in March 1990, as travelers continue to take more frequent but shorter hotel/motel trips.

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Overall Travel Prices Decrease in May

For the first time in four months, the overall cost of travel in the United States declined. The decrease, 0.1 percent, was largely due to the drop in lodging prices, according to the Data Center's latest Travel Price Index (TPI).

Travel Price Index and Components

May 1990 TPI Component	Monthly % Change April 1990 to May 1990	Annual % Change May 1989 to May 1990
Transportation	1.0	2.5
Airline Fares	0.5	11.9
Other Intercity Trans.	0.1	2.1
Intracity Public Trans.	0.3	6.2
Motor Fuel	1.4	-4.2
Lodging	-1.7	6.4
Food and Beverages away from home	0.4	5.0
Entertainment	0.1	8.2
TRAVEL PRICE INDEX	-0.1	5.2
CONSUMER PRICE INDEX	0.2	4.4

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. dropped to 132.9 (1982 - 84 = 100) during May.

For comparison, the overall cost of all goods and services Americans purchase, as measured by the Consumer Price Index (CPI), rose 0.2 percent to 129.2.

The decrease in overall travel costs was the first since December. Lodging prices showed the only decrease in May, but it was substantial enough, at -1.7 percent, to drop the TPI. For the second straight month lodging prices showed the only decrease in the TPI. Overall transportation costs rose 1.0 percent in May. Motor fuel, a component of transportation, showed the greatest increase at 1.4 percent. Airline fares, intercity transportation and intracity public transportation also showed slight increases.

Entertainment also showed a slight increase, rising 0.1 percent in May, and food and beverages away from home showed a 0.4 increase in cost for the month.

Over the past 12 month period, the TPI rose 5.2 percent, influenced by a 11.9 percent jump in airline fares and a 8.2 percent increase in entertainment costs. Even though lodging experienced the only decrease in cost in April, it still showed an increase of 6.4 percent over the last 12 months.

Visitor Volume at National Parks

Region	APR 1990 visits	% Change from APR 1989	Year to Date % Change 1990/89*
NEW ENGLAND	1,001,081	10.1%	-1.5%
MIDDLE ATLANTIC	2,177,783	-6.6	-9.1
SOUTH ATLANTIC	6,838,963	-8.2	-4.3
EAST SOUTH CENT.	1,483,127	-17.9	-23.6
EAST NORTH CENT.	416,308	22.7	4.3
WEST NORTH CENT.	489,077	2.7	0.9
WEST SOUTH CENT.	918,216	-11.1	-0.7
MOUNTAIN	2,934,230	6.4	3.1
PACIFIC	3,835,717	-2.7	-3.4
TOTAL	20,094,502	-4.5	-5.0

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: **New England:** Conn., Maine, Mass., N.H., R.I., Vermont. **Middle Atlantic:** N.J., N.Y., Penn. **S. Atlantic:** Del., District of Columbia, Fla., Ga., Md., N. C., S.C., Va., W. Va. **East South Central:** Ala., Ky., Miss., Tenn. **East North Central:** Ill., Ind., Mich., Ohio, Wis. **West North Central:** Iowa, Kan., Minn., Mo., Neb., N.D., S.D. **West South Central:** Ark., La., Okla., Texas. **Mountain:** Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. **Pacific:** Alaska, Calif., Hawaii, Ore., Wash.

TEIM Update

The Data Center's revision of the Travel Economic Impact Model (TEIM) is in its final stages of completion, according to Dr. William Fleming, manager of economic research.

The forecasting component, which enables the Data Center to make short-term and long-term predictions about travel volume and expenditures, will be completed this month. The model also has the capability to make projections of the economic impact of travel for the country, states, counties and metropolitan areas.

Undergoing expansion and improvement, the Data Center's Travel Economic Impact Model (TEIM) is a statistical model that provides annual estimates of travel-generated spending and its impact on national, state and local economies.

Following revision, the model will be a more effective and flexible tool for assessing the impact travel has on the economy.

For more information about the Travel Economic Impact Model (TEIM) and its capabilities, contact Dr. William Fleming, manager of economic research, at (202) 293-1040.

Discoveries...

Meetings & Conventions Magazine has released its 1990 Meetings Market report, a study that documents the activities of corporate and association meeting planners. Data from the report include the number of meetings planned, expenditures, destination selection and the types of hotels used.

The study contains a twenty-two page summary and eighty pages of detailed tables. The cost is $200. For more information contact Mary Concorso at (201) 902-1552.

"Discoveries" is a **Travel Printout** feature designed to give added exposure to all types of travel-related research. To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to **Travel Printout**, U.S. Travel Data Center, 1133 21st Street, Washington, D.C., 20036.

Visitor Volume at National Parks

Region	MAR 1990 visits	% Change from MAR 1989	Year to Date % Change 1990/89*
NEW ENGLAND	440,419	-10.7%	-11.0%
MIDDLE ATLANTIC	1,434,238	-11.8	-5.6
SOUTH ATLANTIC	5,329,737	-3.9	-1.7
EAST SOUTH CENT.	1,233,465	-23.4	-26.2
EAST NORTH CENT.	261,533	7.5	-4.6
WEST NORTH CENT.	302,985	-8.0	-0.4
WEST SOUTH CENT.	797,364	-2.3	6.1
MOUNTAIN	2,284,856	0.1	2.6
PACIFIC	3,074,565	-4.1	3.5
TOTAL	15,159,162	-6.2	-2.9

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: **New England:** Conn., Maine, Mass., N.H., R.I., Vermont. **Middle Atlantic:** N.J., N.Y., Penn. **S. Atlantic:** Del., District of Columbia, Fla., Ga., Md., N. C., S.C., Va., W. Va. **East South Central:** Ala., Ky., Miss., Tenn. **East North Central:** Ill., Ind., Mich., Ohio, Wis. **West North Central:** Iowa, Kan., Minn., Mo., Neb., N.D., S.D. **West South Central:** Ark., La., Okla., Texas. **Mountain:** Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. **Pacific:** Alaska, Calif., Hawaii, Ore., Wash.

News from the Data Center

In order to better serve Data Center members and subscribers, **Travel Printout** will begin and continue to publish the most up-to-date statistics available in the Travel Price Index (TPI), Current Travel Indicators (CTI) and the Visitor Volume at National Park's series.

The latest statistics covering TPI, Current Travel Indicators and Visitor Volume at National Parks are published on pages 3 and 5. The previous month's figures are located on pages 4 and 6. If you have any questions or comments contact Scott Dring at (202) 293-1040.

USTDC REPORTSTO BE RELEASED IN JULY

The 1989-90 Economic Review of Travel in America, the basic reference on the role of travel activity and the travel industry in the American economy, is in the final stages and will be released in late July.

The 100-page review contains charts, tables, maps and narrative on such things as the regional travel patterns and travel price inflation. The price for the report is $60.

In addition, the 1989 National Travel Survey Full Year Reports will also be released in late July.

The two reports are *The 1989 Executive Briefing*, which wraps up travel in 1989 with a review of the events that shaped the market place. It sells for $145.00. *The 1989 Travel Market Close-up* contains detailed tabulations covering the preferences and characteristics of important market segments and sells for $145.00. Both publications can be ordered for $265.

All publications will be sent free to Data Center members.

Current Travel Indicators - 1989-90

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	APR	$ 5,417	million	-5.1	5.3	8.4
Eating and Drinking Places(2)	APR	$15,007	million	-1.1	10.6	6.9
Gasoline Service Stations(2)	APR	$ 9,803	million	-1.9	6.7	10.7
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	APR	63.2	percent	-2.6	-0.5	2.2
Real Demand for Commercial Lodging(4)	APR	63.9	million	-3.8	2.9	4.3
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	APR	26.9	billion	-5.8	6.3	4.2
Int'l Revenue Passenger-Miles	APR	8.8	billion	-1.6	21.0	20.4
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	APR	543.1	million	0.1	9.4	2.6
Travel Price Index (1982 - 84 = 100) (8)	APR	133.1		0.2	5.9	6.6
Public Use of National Parks (11)						
Visits	APR	20,094,502		32.6	-4.5	-5.0
Overnight Stays	APR	1,058,482		50.8	14.1	5.0
Foreign Arrivals to the U.S.						
From Canada(13)	APR	1,463,760		-1.3	17.8	13.8
U.S. Citizen Departures						
To Canada(13)	APR	669,694		18.6	12.6	3.6
Domestic Demand for Gasoline						
Barrels/Day(14)	APR	7,116	thousands	-2.9	-0.5	-0.5

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1991 TRAVEL OUTLOOK FORUM

Co-sponsored by the Travel & Tourism Research Association
and held in conjunction with the Travel Industry Association's National Conference

Pittsburgh Hilton
October 16-17, 1990

For more information call the Data Center: 202/293-1040

Current Travel Indicators - 1989-90

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	MAR	$ 5,707	million	4.4	8.7	9.6
Eating and Drinking Places(2)	MAR	$15,258	million	7.5	12.4	5.9
Gasoline Service Stations(2)	MAR	$10,007	million	6.4	13.1	11.3
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	MAR	64.9	percent	1.4	1.7	3.1
Real Demand for Commercial Lodging(4)	MAR	66.5	million	9.0	5.0	4.8
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	MAR	28.5	billion	20.4	4.1	3.5
Int'l Revenue Passenger-Miles	MAR	8.9	billion	25.8	21.4	20.2
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	MAR	43.5	billion	21.7	2.6	4.2
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	MAR	542.8	million	32.4	3.5	0.1
Travel Price Index (1982 - 84 = 100) (8)	MAR	132.8		1.5	6.2	6.8
U.S. Resident Travel						
Total Person-trips(9)	MAR	87.8	million	30.9	4.9	5.6
Vacation Person-trips(9)	MAR	52.4	million	28.1	-1.0	4.7
Total Person-nights(10)	MAR	325.0	million	27.5	n/a	n/a
Vacation Person-nights(10)	MAR	220.0	million	25.0	n/a	n/a
Public Use of National Parks (11)						
Visits	MAR	15,159,162		41.4	-6.2	-2.9
Overnight Stays	MAR	702,128		52.6	-8.2	-0.5
Foreign Arrivals to the U.S.						
From Overseas(12)	FEB	925,044		-8.3	11.1	12.9
From Canada(13)	MAR	1,483,060		58.2	6.1	12.2
From Mexico(12)	FEB	72,738		-9.6	20.9	8.6
U.S. Citizen Departures						
To Overseas(12)	DEC	1,229,400		18.5	4.3	1.9
To Canada(13)	MAR	564,873		25.0	-3.3	-0.2
Domestic Demand for Gasoline						
Barrels/Day(14)	MAR	7,366	thousands	3.3	-0.7	-0.1

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

US Travel Data Center
Two Lafayette Centre
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Washington, D.C.
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(202) 293-1040

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Research News for the U.S. Travel Industry

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Research News for the U.S. Travel Industry

★★★

TRAVEL PRINTOUT

US Travel Data Center

July 1990 Volume 19, Number 7

Domestic Travel Reaches Record High in 1989

More Americans traveled in 1989 than ever before, amassing nearly 1.26 billion person-trips, a 2 percent increase over 1988. (A person-trip is one person traveling 100 miles or more away from home).

Total travel increased for the fifth consecutive year in 1989 and has increased more than 23 percent during that five-year span, according to the Data Center's 1989 National Travel Survey Full-year reports.

After leveling off in 1988, business travel increased more than 9 percent with 232 million person-trips. More than 22 percent of all business trips were combined with vacation in 1989, double the percentage in 1988.

Vacation and weekend travel also enjoyed banner years in 1989. Vacation travel jumped 6 percent to total more than 878 million person-trips, and weekend travel rose 4 percent with more than 582 million person-trips.

Traveling by automobile, truck or RV was again the most popular mode of transportation in 1989, increasing 3 percent over 1988. More than 78 percent of all travel was auto-related in 1989, while 19 percent traveled by air.

Travel for pleasure purposes grew for the sixth consecutive year, registering more than 945 million person-trips. Visiting friends and relatives was the most popular purpose for pleasure travel, followed by entertainment and outdoor recreation.

Attracting more travel than any other census region, the South Atlantic received 281 million person-trips in 1989. Only two other regions showed gains during the year, the East South Central and Mountain regions.

The age group of 18-34 took the greatest share of trips in 1989 with more than 40 percent. The 35-54 group, including the leading edge of the "baby boom," took 36 percent of all trips, while those 55 and over accounted for the remaining 24 percent.

Hotels/motels was again the most popular lodging type in 1989 with 43 percent of all person-trips. Lodging at friends and relatives homes garnered 39 percent. The average number of nights spent in hotel/motel, 3.3 nights, fell for the fifth consecutive year, continuing the trend toward shorter durations.

After decreasing for the past three years, average travel party size increased slightly to 1.9 persons per trip.

The Data Center's full year reports; **The 1989 Travel Executive Briefing**, a complete overview of 1989 travel activity, and **The 1989 Travel Market Close-up**, a collection of detailed data tabulations are available for $145 each, or $265 per set by writing to: U.S. Travel Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C. 20036. *(Data Center members will be receiving a complimentary copy).*

European Travel Expert to Speak at Travel Outlook Forum

Rolf Freitag, of the European Travel Data Center, will reveal the travel characteristics and patterns of Europeans, at the U.S. Travel Data Center's sixteenth annual Travel Outlook Forum.

The forum, co-sponsored by the Travel and Tourism Research Association and held in conjunction with the Travel Industry Association's National Conference, will be held on October 16-17 at the Pittsburgh Hilton & Towers in Pittsburgh, Pennsylvania.

Freitag is the coordinator of the European Travel Data Center in Luxembourg. The ETDC produces the **European Travel Monitor**, which collects detailed information on both inbound and outbound travel markets.

Nearly 35,000 Europeans are interviewed six times a year to determine their travel during the previous two months. A total of 200,000 are interviewed every year to provide highly reliable measures of travel volume, market share, characteristics and trends.

(continued on page 3)

The U.S. Travel Data Center's
1991 TRAVEL OUTLOOK FORUM

Co-sponsored by the Travel & Tourism Research Association
Pittsburgh, Pennsylvania
October 16-17, 1990

Motor Fuel Leads Travel Price Increases in June

After decreasing in May, the cost of travel in the United States increased moderately due in part to the rise in motor fuel prices. According to the Data Center's latest Travel Price Index (TPI), the cost of travel rose 0.8 percent in June.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. grew to 133.9 (1982 - 84 = 100) during June.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) rose 0.5 percent to 129.9.

Travel Price Index and Components

June 1990 TPI Component	Monthly % Change May 1990 to June 1990	Annual % Change June 1989 to June 1990
Transportation	1.4	4.0
Airline Fares	0.3	11.6
Other Intercity Trans.	0.7	1.6
Intracity Public Trans.	0.5	6.7
Motor Fuel	2.3	-1.5
Lodging	1.2	6.1
Food and Beverages Away From Home	0.3	5.0
Entertainment	0.3	6.7
TRAVEL PRICE INDEX	0.8	5.4
CONSUMER PRICE INDEX	0.5	4.7

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

Motor fuel showed the largest increase in June, jumping more than 2 percent. Even though moter fuel showed the highest increase, it decreased more than 1 percent over the last 12 months.

Overall transportation costs rose 1.4 percent in June. Airline fares, intercity transportation and intracity public transportation showed slight increases.

Entertainment also showed a slight increase, rising 0.3 percent in June. Food and beverages away from home also showed a 0.3 percent increase in June. Lodging costs showed an increase of more than 1 percent.

Over the past 12 month period, the TPI rose 5.4 percent, influenced by a 11.6 percent jump in airline fares and a 6.7 percent increase in entertainment. Intracity transportation and lodging showed increases of 6.7 and 6.1 percent, respectively.

April Travel Jumps 9 Percent

Travel this April increased nearly 10 percent over last April with more than 88.9 million person-trips taken by U.S. residents, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

The largest increase occurred in weekend travel, keeping with the ever-growing trend towards weekend travel closer to home. The average round-trip distance for weekend travel dropped from 720 round-trip miles in April 1989 to 600 round-trip miles this April.

Vacation travel also increased significantly in 1989 with more than 59 million person-trips. In addition, there were more people in the average party this April, compared to last April.

There were more than 15 million business person-trips this April, a 9 percent decrease over April 1988, but the trips were longer in duration, averaging 3.6 nights this year compared to 3.1 nights last year.

Automobile travel jumped nearly 14 percent with more than 71 million person-trips. Air travel declined slightly in February 1990, but those who traveled by air flew farther. The average round-trip distance for air travel rose to 1930 miles from 1790 miles in April 1989, resulting in the increase in air passenger miles reported by the Air Transport Association.

Pleasure travel increased nearly 10 percent this past April with 66 million person-trips. The average round-trip distance for pleasure travel decreased from 890 round-trip miles last April to 680 round-trip miles this April.

The overall average duration of a trip increased to 3.6 nights in April 1990, compared to 3.4 nights in the previous year. Air travel showed the largest increase, jumping from 4.3 nights to 5.1 nights per trip.

Travel to the Great Lakes Region surged to 13.1 million person-trips in April 1990. Travel to the West Region remained strong while travel to both the Northeast and Southeast Regions grew moderately, posting year-to-date increases of 9 and 6 percent, respectively.

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. (202) 293-1040.

Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year payable in U.S. funds. ISSN: 0744-6233.

(continued from page 1)

The U.S. Travel Data Center and The European Travel Data Center recently signed an agreement to become the exclusive representative on their respective continent of each other's products, primarily in depth research surveys.

"It was important for us to expand our services internationally in order to help meet the growing challenges of the 1990s and to better serve the U.S. travel industry," said Suzanne Cook, executive director at the Data Center.

Other keynote speakers for this year's forum will include: Data Center Executive Director Suzanne Cook, Don Wynegar, director of the office of research at the U.S. Travel and Tourism Administration and Dr. Steve Malin, who will discuss the 1991 economic outlook.

The 1991 Travel Outlook Forum and the Travel Industry Association's National Conference will be held October 16-17 at the Pittsburgh Hilton & Towers ir Pittsburgh, Pennsylvania. Registration for the forum only for TIA/Data Center/TTRA members is $195, non-members, $225. The entire two-day conference and forum is $350 for members and $420 for others.

For additional information or to register for the forum and conference contact the Data Center at (202) 293-1040.

Discoveries needed...

Do you have a travel research project that deserves a little recognition? **Travel Printout** is the place in the monthly "Discoveries" section.

"Discoveries" is a **Travel Printout** feature designed to give added exposure to all types of travel-related research.

To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to Scott Dring, U.S. Travel Data Center, 1133 21st Street, Washington, D.C., 20036.

Winter Travel Report Released

Travel in Winter 1989-90 reached a record high with more than 260 million person-trips, a 5.6 percent increase over the same period last year, according the Data Center's *1989-90 Winter Travel Market Report.*

The report, which encompasses U.S. resident travel over December 1989, January and February 1990, is measured through the monthly National Travel Survey.

Nearly three-fourths of the winter 1989-90 person-trips were taken for pleasure purposes. There were more than 187 million pleasure person-trips last winter, a nearly 5 percent increase from the previous winter. More than 48 percent of all pleasure travelers stayed with friends/relatives while 35 percent stayed in commercial lodgings.

Hotel/motel volumes posted the largest increase over last winter in terms of person-trips, even though the duration of stays were shorter. All other types of travel experienced a rise in volume as well, such as business/convention and weekend travel, which increased 13 and 14 percent, respectively.

Of the 47 million business person-trips taken during the winter, 12 percent were also considered to be a vacation trip. Business travelers stayed an average of 3.4 nights on their trips, compared to 4.2 nights for all travelers.

Average round-trip distances and average trip durations during winter 1989-90 were very similar to those last year. People traveling during the season went an average of 980 round-trip miles and spent, on the average, 4.2 nights away from home.

Auto travel increased over last winter. There were more than 198 million person-trips by automobile last winter, a 5 percent increase over the previous winter.

The 1989-90 Winter Travel Market Report can be purchased for $100 by contacting the Data Center at (202) 293-1040. *(Data Center members will be receiving a complementary copy).*

Visitor Volume at National Parks

Region	MAY 1990 visits	% Change from May 1989	Year to Date % Change 1990/89*
NEW ENGLAND	1,524,410	11.3%	3.8%
MIDDLE ATLANTIC	2,435,648	-20.9	-15.9
SOUTH ATLANTIC	7,544,899	-17.8	-8.0
EAST SOUTH CENT.	1,550,465	-22.9	-2.0
EAST NORTH CENT.	533,767	-4.2	1.4
WEST NORTH CENT.	857,423	-5.6	-52.1
WEST SOUTH CENT.	1,043,609	-10.8	-3.9
MOUNTAIN	4,043,213	1.9	2.8
PACIFIC	3,992,552	-8.2	-4.1
TOTAL	23,525,986	-11.5	-6.9

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Nevt., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

Current Travel Indicators - 1990

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	May	$ 5,468	million	0.9	7.9	8.3
Eating and Drinking Places(2)	May	$14,930	million	-0.5	4.0	2.0
Gasoline Service Stations(2)	May	$ 9,642	million	-1.6	-3.7	2.0
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	May	64.9	percent	2.7	1.6	2.1
Real Demand for Commercial Lodging(4)	May	65.0	million	1.7	4.5	4.3
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	May	26.8	billion	-0.4	2.6	3.9
Int'l Revenue Passenger-Miles	May	9.5	billion	8.9	14.4	19.0
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Apr	43.8	billion	0.7	6.0	4.7
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	May	512.9	million	-5.6	1.2	2.3
Travel Price Index (1982 - 84 = 100) (8)	May	132.9		-0.2	5.2	6.3
U.S. Resident Travel						
Total Person-trips(9)	Apr	88.9	million	1.3	9.6	6.7
Vacation Person-trips(9)	Apr	59.2	million	13.0	28.7	10.4
Total Person-nights(10)	Apr	320.0	million	-1.5	15.0	13.0
Vacation Person-nights(10)	Apr	243.0	million	10.5	29.1	11.3
Public Use of National Parks (11)						
Visits	May	23,525,986		17.1	-11.5	-6.9
Overnight Stays	May	1,509,948		42.7	0.9	3.4
Foreign Arrivals to the U.S.						
From Overseas(12)	Mar	1,108,574		19.8	0.6	8.1
From Canada(13)	May	1,287,874		-12.0	9.9	12.9
From Mexico(12)	Mar	85,870		18.1	-23.0	-5.4
U.S. Citizen Departures						
To Overseas(12)	Jan	N/A				
To Canada(13)	May	1,042,919		55.5	1.5	2.9
Domestic Demand for Gasoline						
Barrels/Day(14)	May	7,153	thousands	0.5	-3.1	-1.2

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

US Travel Data Center

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Washington, D.C.
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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel
Data Center

August 1990 **Volume 19, Number 8**

Travel Industry Continues Economic Growth

The travel industry continues to be one of the fastest growing industries in the United States, as domestic and foreign visitors spent more than $350 billion in U.S. receipts during 1989, seven percent more than in 1988, according to the U.S. Travel Data Center's *1989-90 Economic Review of Travel in America*.

"The travel industry has doubled in sales receipts since 1980," said Dr. Suzanne D. Cook, executive director of the Data Center. "It is the third largest U.S. retail industry and the second largest in terms of employment."

Travel spending in the U.S. directly generated 5.8 million jobs in 1989, paying nearly $74 billion in wages and salaries. It also produced $43 billion in federal, state and local tax revenue.

Over the past decade, travel industry employment grew 43 percent, more than twice the growth rate for all U.S. industries. Travel industry employment, which generates more jobs than any other industry except health services, grew 2.5 percent in 1989.

The travel industry continues to provide proportionally more jobs for blacks, hispanic-Americans and women than in other U.S. industries. In 1989, jobs for blacks represented 11.5 percent of total travel industry employment, compared to 11.2 percent nationally; hispanic-Americans represented 10.5 percent in the travel industry, versus 7.3 percent nationally, and women occupied 51.5 percent of all travel industry jobs, compared to 45.2 percent nationally.

The report also features an historical analysis of travel's impact on the U.S. economy. Even though sales receipts in the travel industry have doubled since 1980, there is evidence that travel demand expanded sluggishly during the 1980s.

Employment and real output, two measures of industry growth, have grown more slowly during the current economic expansion than it did through the 1970s. The slowdown is attributed, in part, to the slow-growth economy, moreover consumers have found in-house and near-home entertainment appealing alternatives to leisure travel away from home, according to the report.

In 1989, the number of foreign visitors to the United States reached a record high of 38 million in 1989, up 12 percent from the previous year. Their expenditures totaled $34 billion and generated 570 thousand jobs.

According to the report, travel and tourism activity requires a small amount of energy, but makes a major contribution to the U.S. economy. Travel and tourism comprised only 4.5 percent of the nation's travel domestic energy demand in 1988, virtually unchanged from 1984.

This is the Data Center's eighth annual report on the role of travel and tourism in the American economy. It reviews the current economic characteristics of travel away from home, developments in the U.S. travel industry, and the effects of recent economic changes on travel and tourism.

The 1989-90 Economic Review of Travel in America is available for $60 by contacting the U.S. Travel Data Center at (202) 293-1040.
(Data Center members will be receiving a complimentary copy).

International Research Available Through USTDC

The Data Center recently announced that it will provide international reports, analyses and databases, after its agreement to become the official marketing and sales representative for the Office of Research at the United States Travel and Tourism Administration (USTTA).

"The agreement reinforces the Data Center as the recognized source of travel research, not only in the United States but internationally as well," said Suzanne D. Cook, executive director of the Data Center. The announcement comes three months after the Data Center became the exclusive marketing representative in North America for the European Travel Data Center, the premier source of information regarding the European travel market.
(continued on page 3)

INSIDE: USTTA Publication's Guide...insert
Travel Outlook Forum... p. 5

July Travel Prices Show Highest Increases of 1990

Despite decreases in motor fuel costs, airline fares and overall transportation prices, the cost of travel in the United States showed the highest increase thus far in 1990. According to the Data Center's latest Travel Price Index (TPI), the cost of travel rose 2.7 percent in July.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. grew to 137.5 (1982 - 84 = 100) during July.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) rose 0.4 percent to 130.4.

Travel Price Index and Components

July 1990	Monthly % Change June 1990 to July 1990	Annual % Change July 1989 to July 1990
TPI Component		
Transportation	-0.2	4.7
Airline Fares	-0.1	11.4
Other Intercity Trans.	1.0	2.4
Intracity Public Trans.	0.3	6.7
Motor Fuel	-0.3	-0.1
Lodging	8.4	7.3
Food and Beverages Away From Home	0.4	4.8
Entertainment	0.9	6.4
TRAVEL PRICE INDEX	2.7	5.8
CONSUMER PRICE INDEX	0.4	4.8

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

For the most part, lodging costs attributed to the increase in the TPI. It jumped 8.4 percent in July and has showed an increase of more than 7 percent during the last 12 months.

Motor fuel showed the largest decrease in July, dropping 0.3 percent. Motor fuel prices also showed the only decrease over the last 12 months, in which it dropped 0.1 percent.

Overall transportation costs decreased 0.2 percent in July. Airline fares, a component of transportation, also showed a decrease. Intercity transportation and intracity public transportation showed slight increases.

Entertainment showed a slight increase, rising nearly 1 percent in July. Food and beverages away from home showed a 0.4 increase in July.

May Travel drops 2 Percent

After a steady increase in the first four months of 1990, May travel decreased nearly 2 percent over last May with more than 108.8 million person-trips taken by U.S. residents, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

Declines also occurred in business, air and auto/truck/RV travel. Air travel showed a decrease of nearly 9 percent on a person-trip basis, while auto/truck/RV dropped 2 percent over last May. Business travel showed a substantial decrease after a surge last May.

Also showing a decline was distance traveled. Total round-trip distance dropped 200 miles from May 1989 to May 1990.

The largest increase occurred in weekend travel, increasing nearly 9 percent and keeping with the ever-growing trend towards weekend travel closer to home. The average round-trip distance for weekend travel dropped from 880 round-trip miles in May 1989 to 580 round-trip miles this May.

Vacation travel showed a slight increase in May with more than 71 million person-trips. In addition, there were fewer people in the average party this May, compared to last May.

Pleasure travel increased nearly 5 percent this past May with more than 80 million person-trips. The average round-trip distance for pleasure travel showed a substantial decrease. It dropped from 1020 round-trip miles last May to 760 round-trip miles this May.

The overall average duration of a trip increased to 4 nights in May 1990, compared to 3.2 nights in the previous year.

For the second straight month, travel to the Great Lakes Region showed a substantial increase. Travel to the West Region remained strong while travel to both the Northeast and Midwest Regions grew moderately, posting year-to-date increases of 4 and 5 percent, respectively.

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. (202) 293-1040.

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Data Center, USTTA Agreement

(continued from page 1)

The USTTA is the primary source for tracking foreign visitor arrivals to the United States. The data are compiled monthly in the *Summary and Analysis of International Travel to the United States*. The publication provides foreign visitor arrival statistics by region and for 90 different countries. Data in the publication includes inbound statistics on a monthly basis by mode of transportation and age groups.

Information from an on-going survey of international travelers is available in the *In-Flight Survey of International Air Travelers*. These quarterly and annual reports provide survey data on travel characteristics and spending patterns of both foreign visitors to the U.S., and U.S. residents traveling by air to overseas countries and Mexico. The survey, which includes 28 questions, is conducted among 91,000 respondents on more than 1,700 flights departing the U.S. per year.

The Pleasure Travel Markets to North America is another popular USTTA product. It provides the market size and volume estimates of long-haul international pleasure travelers in 1989 from the United Kingdom, France, West Germany and Japan. There are additional 1988 reports from Australia, Brazil, Italy and Mexico and 1987 reports from Hong Kong, Singapore and Switzerland.

Information compiled in the reports includes in-depth analysis of where travelers go, type of trip, top 10 activities, most preferred destinations, their interest in a specific destination within the U.S., and a listing of the top places in the U.S. that they visited in the last three years, and psychographic segmentations.

Visitor Volume at National Parks

Region	JUN 1990 visits	% Change from JUN 1989	Year to Date % Change 1990/89*
NEW ENGLAND	1,872,936	-1.7%	1.8%
MIDDLE ATLANTIC	2,947,650	-18.5	-18.6
SOUTH ATLANTIC	9,106,983	-9.7	-5.8
EAST SOUTH CENT.	1,979,045	-16.2	-21.7
EAST NORTH CENT.	822,028	-2.2	0.1
WEST NORTH CENT.	1,626,891	8.7	2.5
WEST SOUTH CENT.	1,182,601	-7.2	-4.1
MOUNTAIN	6,088,233	5.0	3.6
PACIFIC	5,253,816	-7.4	-4.8
TOTAL	30,880,183	-6.6	-6.2

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Nebr., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

The results are published in a variety of different formats that may fulfill a number of specialized needs. The Highlights Report summarizes the research on each country and there are more detailed reports that address each country individually. Eight volumes of computer tables and a set of data diskettes for each country are also available.

The United States Travel and Tourism Administration, an agency of the U.S. Department of Commerce, was established in 1981 by the National Tourism Policy Act.

With offices in major worldwide cities, USTTA serves as a catalyst for U.S. travel entities wishing to enter the international tourism export market. It provides a number of reports and surveys tracking the international travel market and has the capability to create specific requested information on the international market.

Please see the enclosed listing of USTTA publications. For additional information on USTTA materials, contact the Data Center at (202) 293-1040.

Outlook Forum to Discuss Legislative Policies

For the first time, a select panel of transportation experts will weigh the impact of three recent legislative policies at the U.S. Travel Data Center's sixteenth annual Travel Outlook Forum.

Travel experts will discuss how recent legislative policies have and will affect the travel industry. The policies include the National Transportation Policy, the Clean Air Act and the Americans with Disabilities Act.

The roundtable includes representatives from the American Automobile Association, Air Transport Association, American Bus Association and AMTRAK.

The travel industry faces more challenges than ever before and, for one day, experts representing all major segments of the industry will discuss what lies ahead.

The forum, co-sponsored by the Travel and Tourism Research Association and held in conjunction with the Travel Industry Association's National Conference, will also examine the prospects for international travel, 1990 domestic travel with a special presentation on business travel, as well as the 1991 outlook for the U.S. economy.

This year's forum will be held on October 16-17 at the Pittsburgh Hilton & Towers in Pittsburgh, Pennsylvania. Registration for the forum only for TIA/Data Center/TTRA members is $195, non-members, $225. The entire two-day conference and forum is $350 for members and $420 for others.

For additional information or to register for the forum and conference, contact the Data Center at (202) 293-1040.

Current Travel Indicators - 1990

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Hotels, Other Lodging Places(1)	June	$ 5,712	million	4.5	8.7	8.4
Eating and Drinking Places(2)	June	$14,951	million	-0.6	3.5	2.5
Gasoline Service Stations(2)	June	$ 9,944	million	0.6	1.7	2.5
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	June	65.2	percent	0.5	2.5	2.2
Real Demand for Commercial Lodging(4)	June	69.8	million	7.4	5.5	4.5
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	June	29.1	billion	8.8	0.2	3.2
Int'l Revenue Passenger-Miles	June	11.3	billion	18.2	12.9	17.7
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	May	46.7	billion	7.7	4.2	4.3
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	June	543.3	million	5.9	3.9	2.6
Travel Price Index (1982 - 84 = 100) (8)	June	133.9		0.8	5.4	6.1
U.S. Resident Travel						
Total Person-trips(9)	May	108.8	million	22.4	-1.9	4.4
Vacation Person-trips(9)	May	71.7	million	21.1	0.7	7.8
Total Person-nights(10)	May	435.0	million	35.9	N/A	N/A
Vacation Person-nights(10)	May	315.0	million	29.6	N/A	N/A
Public Use of National Parks (11)						
Visits	June	30,880,183		31.3	-6.6	-6.2
Overnight Stays	June	2,561,753		69.7	-0.6	1.8
Foreign Arrivals to the U.S.						
From Overseas(12)	Apr	1,098,153		-0.9	6.2	7.6
From Canada(13)	June	1,196,839		-7.1	12.0	12.8
From Mexico(12)	Apr	130,845		52.4	64.7	11.4
U.S. Citizen Departures						
To Overseas(12)	Jan	1,088,500		-11.5	8.2	8.2
	Feb	998,700		-8.3	10.9	9.5
	Mar	1,245,300		24.7	10.5	9.9
To Canada(13)	June	1,601,160		53.5	3.9	3.2
Domestic Demand for Gasoline						
Barrels/Day(14)	June	7,448	thousands	2.0	-4.3	-1.4

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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TRAVEL PRINTOUT

US Travel Data Center

September 1990 Volume 19, Number 9

Business Travel Increases 9 Percent in 1989

Business travel is more popular than ever, increasing 48 percent in the last five years and accounting for 26 percent of all U.S. trips in 1989, according to the U.S. Travel Data Center's *1989 Survey of Business Travelers (SBT)*.

The report, which is sponsored by the Reed Travel Group, said that 34 million U.S. adults took a total of 170 million business trips in 1989, a nine percent increase from 156 million last year.

Frequent travelers, those who take 10 or more trips per year, and meetings, conventions and trade shows have become increasingly important elements of business travel.

There were 5.2 million frequent business travelers in 1989, accounting for 43 percent of all business trips. Memberships in frequent traveler programs have increased steadily. Nearly one out of every four business travelers or 8.3 million belong to an airline frequent flyer program.

More travelers' primary purpose for a business trip, 37 percent, was to attend meetings, conventions and trade shows. According to the report, travelers who attend meetings are more likely to be well-educated in professional or managerial occupations.

Personal cars was the most popular means of transportation for business travelers in 1989. Forty-four percent of all business travelers used their own cars on an average business trip. Business travelers used airlines 36 percent of the time and rental cars 11 percent.

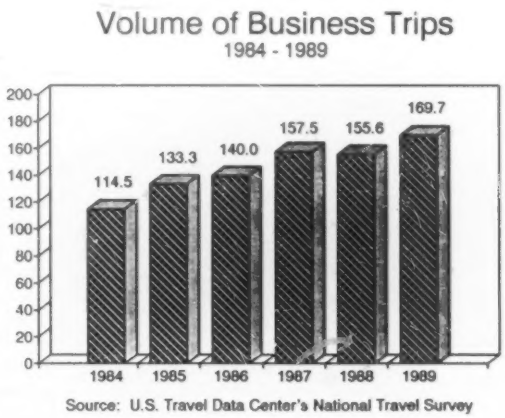
Several demographic groups of business travelers have grown significantly since 1986. Business travelers between the ages of 35 to 44 increased from 25 percent of the total in 1986 to 28 percent in 1989. According to the survey, the majority of business travelers are between the ages of 25 to 44.

In 1989, 35 percent of all business travelers were woman. Sixty-three percent of all business travelers were married and the median age for a business travelers is 39.

Business travelers spent an average of 4.1 nights away from home in 1989. Thirteen percent of business travelers did not spend the night on their trips, compared to 9 percent in 1988. The average person took an average of 4.9 business trips each in 1989, compared to 4.7 trips in 1988.

Hotels/motels are still the preferred accommodation for business travelers, with 65 percent of all business trips involving stays at hotels/motels. However, hotel/motel usage has dropped from 71 percent in 1987.

The number of travel agencies in the U.S. has grown 37 percent since 1984. According to *The 1989 SBT*, there are now more than 35,000 travel agencies and 20 percent of all business trips involved the use of travel agents in 1989.



Source: U.S. Travel Data Center's National Travel Survey

The Survey of Business Travelers has tracked the growth characteristics of U.S. business travelers on a monthly basis since 1985.

The SBT includes an overview of business travel, characteristics of business trips, a profile of business travelers, purpose of trips, modes of transportation and accommodations. Segments on business travel include woman business travelers, business car rentals, frequent travelers and airline travelers.

The 1989 Survey of Business Travelers is available for $85 by contacting the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy).*

INSIDE: Introduction of USTDC's bi-monthly supplement, *Data Center Insider.*

Motor Fuel, Transportation Lead to Travel Price Increase

For the second straight month, the cost of travel in the United States increased more than 2 percent. Motor fuel and transportation led to a 2.4 percent increase in the month of August, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. grew to 140.7 (1982 - 84 = 100) during August.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) rose 0.9 percent to 131.6.

Travel Price Index and Components

August 1990 TPI Component	Monthly % Change July 1990 to August 1990	Annual % Change August 1989 to August 1990
Transportation	5.4	12.4
Airline Fares	0.1	11.5
Other Intercity Trans.	0.3	2.6
Intracity Public Trans.	0.4	5.9
Motor Fuel	9.4	13.4
Lodging	4.0	13.4
Food and Beverages Away From Home	0.3	4.9
Entertainment	0.1	5.8
TRAVEL PRICE INDEX	2.4	9.1
CONSUMER PRICE INDEX	0.9	5.6

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

After showing a decrease in the month of July, motor fuel showed the largest increase of the year, jumping 9.4 percent, due in large part to the Middle East crisis. Motor fuel also showed the highest increase over the last 12 months, increasing more than 13 percent.

Overall transportation costs rose 5.4 percent in August and increased more than 12 percent over the last 12 months. Airline fares, intercity transportation, intracity public transportation and entertainment costs showed slight increases.

Food and beverages away from home also showed a 0.3 increase in August. Lodging costs showed an increase of 4 percent.

Over the past 12 month period, the TPI rose 9.1 percent, influenced by a 11.5 percent jump in airline fares and a 5.8 percent increase in entertainment.

June Travel Jumps 2 Percent

Travel this June increased more than 2 percent over last June with more than 132 million person-trips taken by U.S. residents, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

Pleasure travel also increased significantly in 1989 with more than 106 million person-trips. The round-trip distance for pleasure travel also decreased in June, dropping from 890 round-trip miles last June to 840 miles this June.

Vacation travel showed a slight decrease in June, dropping more than 1 percent. Even though vacation travel dropped slightly in June, the average duration of a vacation trip increased from 4.3 nights last June to 4.6 nights in 1990.

Automobile travel jumped more than 5 percent with more than 108 million person-trips. Air travel showed a slight decrease in June, with more than 19 million person-trips, but those who traveled by air flew farther. The average round-trip distance for air travel rose to 2290 miles from 1890 miles in June 1989, resulting in the increase in air passenger miles reported by the Air Transport Association.

Business travel showed the largest decrease in the month of June. The duration of the average business trip also declined from 4.5 nights last June to 3.8 nights this June.

The average party size dropped from 2.1 people last June to 1.9 people this June. Weekend travelers showed the largest decrease dropping from 2.3 last year to 1.9 this year.

The overall average duration of a trip showed no change from last June, remaining stable at 4.1 nights.

Travel to the Great Lakes region showed the largest increase over last June. The Midwest and West also showed substantial increases.

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Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

1990 Travel Review Conference Scheduled for February

Monday, February 4, 1991! Mark your calendars for the 1991 Travel Review Conference.

A review of important issues affecting the travel industry in 1990, national trends in U.S. domestic travel and a recap of international travel will take place at the fifth annual Travel Review Conference on Monday, February 4, 1991 at the Omni Shoreham Hotel in Washington, D.C.

The Conference, jointly sponsored by the Data Center, U.S. Travel and Tourism Administration (USTTA) and Travel and Tourism Research Association (TTRA), will feature a review of 1990 travel statistics, marketing strategies and other pertinent data to assist travel marketing and research managerial decision-making.

Highlights will include a review of 1990 domestic travel by Suzanne Cook, executive director at the Data Center. Other travel industry experts will discuss 1990 trends in transportation, eco-tourism, the effects of the Middle East crisis and accommodations.

The Travel Review Conference begins a week of travel associated events including USTTA's International Marketing Conference and the Travel and Tourism Government Affairs Council Unity Dinner.

For further information on the fifth annual Travel Review Conference, contact Vernon Azucenas at (202) 293-1040.

Visitor Volume at National Parks

Region	JULY 1990 visits	% Change from JULY 1989	Year to Date % Change 1990/89*
NEW ENGLAND	2,678,874	-4.0%	-0.3%
MIDDLE ATLANTIC	4,069,527	-10.9	-16.4
SOUTH ATLANTIC	10,515,400	-11.6	-8.4
EAST SOUTH CENT.	2,349,150	-12.9	-21.0
EAST NORTH CENT.	1,235,614	-5.7	-1.9
WEST NORTH CENT.	2,247,076	2.7	4.0
WEST SOUTH CENT.	1,187,318	-13.1	-5.4
MOUNTAIN	7,443,735	4.1	3.9
PACIFIC	6,351,292	-15.1	-7.2
TOTAL	38,077,986	-8.1	-7.1

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

South Atlantic Region Most Popular

The South Atlantic region continues to be one of the most popular regional travel destinations, attracting nearly one-quarter of all U.S. trips during 1989, according to the Data Center's *1989-90 Economic Review of Travel in America.*

The South Atlantic grew more than any other region, up more than 20 percent in person-trips over the previous year. The Mountain region posted a double-digit rate of growth as well.

The smallest number of trips were made to the New England region, comprising less than 4 percent of all U.S. person-trips for the year.

According to the recently released report, the travel industry has outperformed the overall economy in creating new jobs over the last 18 years. Since 1972, payroll jobs in travel-related businesses have more than doubled while the total U.S. payroll employment increased by less than one-half.

In the last decade, travel industry employment has grown 43 percent, more than twice the growth rate for all U.S. industries.

The 1989-90 Economic Review of Travel in America, the eighth annual report on the role of travel and tourism on the American economy, can be purchased for $60 by contacting the Data Center at (202) 293-1040.

News at the Data Center

To better inform members on the latest Data Center services and publications, the Data Center is introducing a new supplement, published six times a year, as an addition to Travel Printout.

The supplement, entitled **Data Center Insider,** provides another outlet for members to receive full benefits from the Data Center. It will include information on the latest publications, services and insight that the Data Center has to offer.

The September issue addresses the newly reached agreements with the U.S. Travel and Tourism Administration and the European Travel Data Center to market international travel research, in addition to the final program for the 1991 Travel Outlook Forum on October 16, 1990 in Pittsburgh, Pennsylvania.

Features in the November issue will include a closer look at the 1991 Travel Review Conference on February 5, 1991 in Washington, D.C..

Current Travel Indicators - 1990

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	July	$ 5,333	million	-6.6	6.7	8.2
Eating and Drinking Places(2)	July	$15,222	million	-0.4	5.1	3.3
Gasoline Service Stations(2)	July	$10,021	million	-0.3	2.2	2.7
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	July	62.2	percent	-4.6	-1.0	1.7
Real Demand for Commercial Lodging(4)	July	67.1	million	-3.9	3.3	4.3
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	July	30.5	billion	4.8	2.8	3.1
Int'l Revenue Passenger-Miles	July	12.5	billion	10.5	15.4	17.2
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	June	47.8	billion	2.5	3.9	4.2
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	July	589.5	million	8.5	5.4	3.0
Travel Price Index (1982 - 84 = 100) (8)	July	137.5		2.7	5.9	6.1
U.S. Resident Travel						
Total Person-trips(9)	June	132.8	million	22.1	2.2	3.9
Vacation Person-trips(9)	June	93.5	million	30.4	-1.2	5.4
Total Person-nights(10)	June	544.0	million	25.1	N/A	N/A
Vacation Person-nights(10)	June	430.0	million	36.5	N/A	N/A
Public Use of National Parks (11)						
Visits	July	38,077,986		23.1	-8.1	-7.1
Overnight Stays	July	3,366,536		31.4	0.5	1.4
Foreign Arrivals to the U.S.						
From Overseas(12)	May	1,222,732		11.3	9.8	8.1
From Canada(13)	July	2,298,402		92.0	9.3	11.9
From Mexico(12)	May	88,334		-32.5	-1.3	8.7
U.S. Citizen Departures						
To Overseas(12)	APR	1,231,300		-1.1	11.5	10.3
To Canada(13)	July	2,097,713		31.0	-4.0	0.9
Domestic Demand for Gasoline						
Barrels/Day(14)	July	7,664	thousands	2.5	5.0	-0.4

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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